



FIRST 5 KERN GEMS USER MANUAL



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ACCESSING GEMS

ACCESSING GEMS

GEMS can be accessed at the following link:

<http://www.mosaic-network.com/gemslive/KERN/>



Figure 1: The GEMS Landing Page.

The link above will take you to a *Landing* page, from which you can log into GEMS. Use the button in the center of the page to access the GEMS login screen. The links on the left of the screen do not require a password, and allow you to access the following resource:

Contact GEMS support: this link provides information about how to contact GEMS support: by phone, by email, or online.

LOGIN AND USER INFORMATION

Logging in: From the *Landing* page shown above, select “Log into GEMS” in order to proceed to the login page.

Enter your *User Id* and *Password* in the login dialogue box. Usernames and passwords shall be distributed through email; contact GEMS technical support staff for more information regarding your username and password.



Figure 2: The GEMS “login” box

Access Levels: GEMS allows a variety of access privileges for users. Depending on access levels, certain GEMS functionalities may or may not be available to each GEMS user. For information on your allowed access, please contact GEMS technical support staff.

Inactivity: Please note that for security reasons, if a user is logged into the system and is inactive for more than 20 minutes, GEMS will log the user out of the system. The system will provide a message to inform the user that (s)he will be timed out. If s(he) is still using the system (s)he may click “Ok” to stay logged into the system. If the user does not choose to stay logged in or is away from the computer, the system will log him or her out. The user will need to log back into the system if this occurs.

BASIC NAVIGATION

GEMS PORTAL

Once you have logged into GEMS, you will be directed to the main hub of the system, or the *GEMS portal*. The *GEMS portal* provides an overview of the Kern County system and its capabilities. Along the left side of the screen is the main menu, which will direct you to different sections, or modules of the system. Clicking on one of these menu links will direct you to that specific module. The center of the screen displays graphical statistics on specific Kern County information, such as milestones, expenses and client demographics.

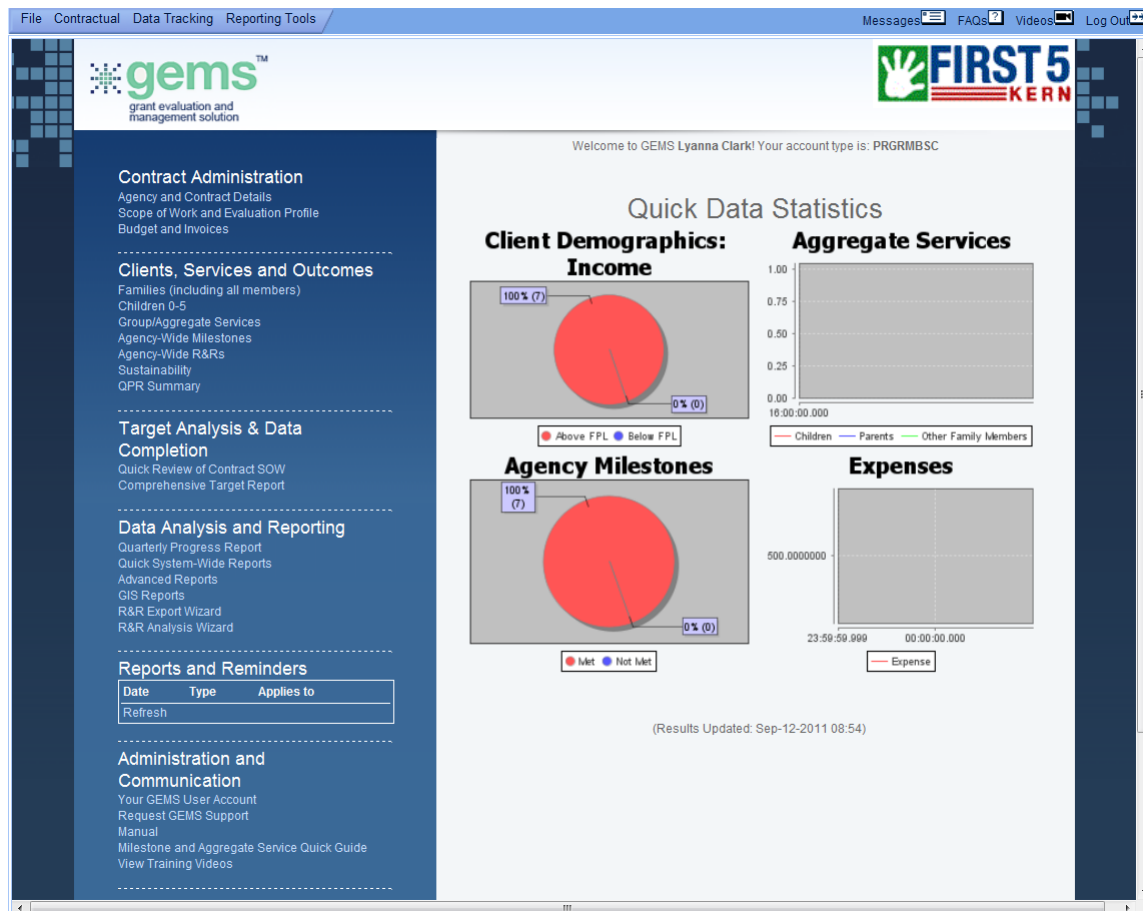


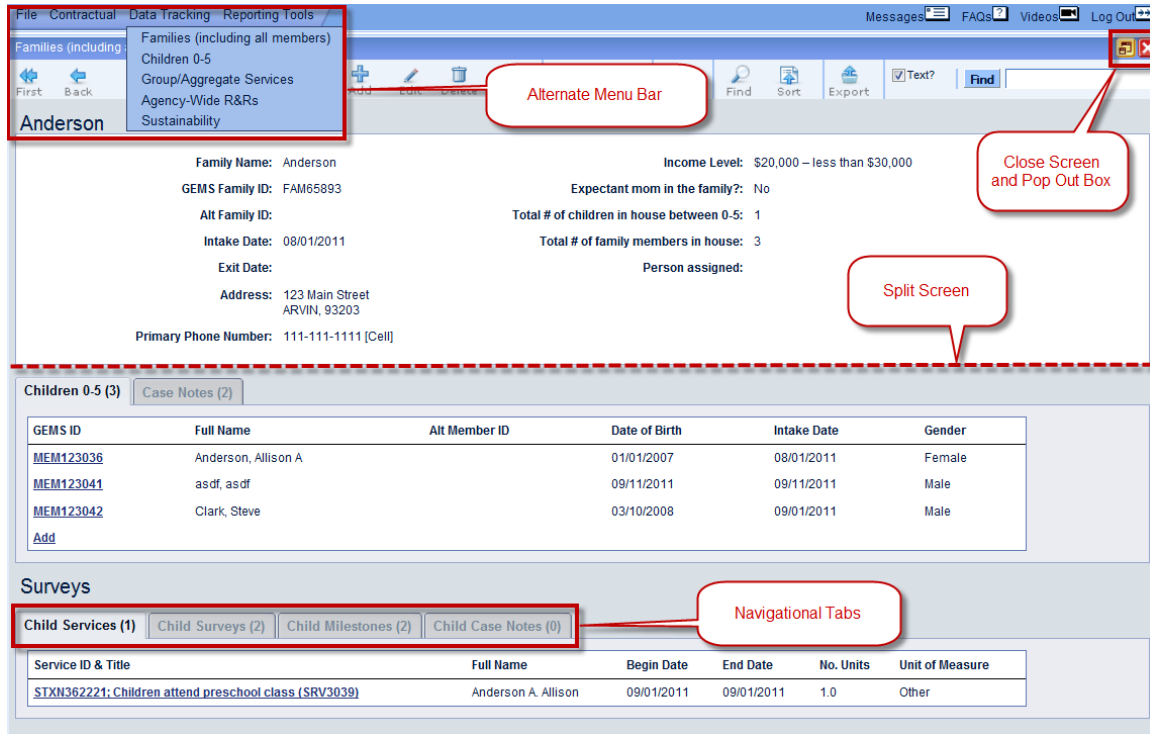
Figure 3: GEMS Portal

DATA ORGANIZATION AND MANAGEMENT

Split Screen - Most GEMS screens include split screens, which contain both general and specific information relating to the record you are viewing. The top section of this pane, known as the *Header Pane*, contains the general information of the record, such as first and last names and family ID. The *Header Pane* makes it easy for you to navigate through a large number of records. The bottom section of this pane, known as the *Details Pane*, is used for modifying data. Operations and reports can be accessed through either pane. To access specific tables of data, click on the appropriate tab at the top of the *Details Pane*. Each tab contains a different type of record, such as *Child Details* or *Case Notes*. Whereas the *Header Pane* contains limited, general information about the client, the *Details Pane* contains multiple tabs of data associated with that client.

Menu Bar - In addition to the main menu on the *Landing Page*, GEMS provides a menu bar at the top of your screen that allows you to jump from one module to the next. The options that appear in the top screen drop-down menus contain the same information as in the main menu.

Getting Back to the Landing Page - If you need to close your current data screen and return to the *Landing Page*, simply click on the red "X" inset in the top right corner of your screen. Clicking on this will close your current data screen, so make sure to save any changes you have made before closing the screen.



Anderson

Family Name: Anderson
 GEMS Family ID: FAM65893
 Alt Family ID:
 Intake Date: 08/01/2011
 Exit Date:
 Address: 123 Main Street
 ARVIN, 93203
 Primary Phone Number: 111-111-1111 [Cell]

Income Level: \$20,000 – less than \$30,000
 Expectant mom in the family?: No
 Total # of children in house between 0-5: 1
 Total # of family members in house: 3
 Person assigned:

Children 0-5 (3) | Case Notes (2)

GEMS ID	Full Name	Alt Member ID	Date of Birth	Intake Date	Gender
MEM123036	Anderson, Allison A		01/01/2007	08/01/2011	Female
MEM123041	asdf, asdf		09/11/2011	09/11/2011	Male
MEM123042	Clark, Steve		03/10/2008	09/01/2011	Male

[Add](#)

Surveys

Child Services (1) | Child Surveys (2) | Child Milestones (2) | Child Case Notes (0)

Service ID & Title	Full Name	Begin Date	End Date	No. Units	Unit of Measure
STXN362221: Children attend preschool class (SRV3039)	Anderson A. Allison	09/01/2011	09/01/2011	1.0	Other

Figure 4: Data Screen

Pop-out Screen - To access the *Pop-out Screen* option, simply click on the yellow button located in the top right corner of your screen next to the red "X." By clicking on the *Pop-out button*, your current data screen will become a separate movable screen, allowing you to view multiple screens at once.

Pop-up Buttons - GEMS has included specialty buttons in different details panes that can perform easy, 1-click reports. Clicking on a button will bring up a pop-up window containing the information requested. Many *Pop-up buttons* are labeled "1 Click," which provides a snapshot of the module or record you are working with.

Children 0-5

Record 1 of 8

Anderson, Allison A.

Member Name: Allison A Anderson
 GEMS MEM ID: MEM123036
 Family: [Anderson \(FAM65893\) \[1\]](#)
 Alt Member ID:
 Date of Birth: 01/01/2007
 Program Entry Date: 08/01/2011
 Gender: Female
 Address: BAKERSFIELD, 93313, ,
 123 Main Street
 Address since: 09/01/2008

Demographics | Entry/Exit & Consent | Child Fields

Ethnicity: Multiracial

Birth Intake Survey (1)
 Core Data Elements (0)

Pop-up Buttons

Surveys

Services (1) | Milestones (2) | Case Notes (0)

Milestone ID & Title	End Date for the Reporting Period	Response	Response numeric	Notes
MTXN28501 (Child receives annual dental exams) [MDEF398, Met/Not-Met]	08/05/2011	Met		
MTXN28502 (Child receives restorative dental care) [MDEF402, Met/Not-Met]	08/05/2011	Met		

[Add](#)

Figure 5: Pop-up Buttons

Editing: To edit a record in a table, click “Edit”. This will switch the system into edit mode, where you will be able to change or add information.

Saving Information: To save changes, click “Save”. This will exit you from edit mode and will save all changes and new information added.

Removing Changes: To discard any changes, click “Cancel”. This will exit you from edit mode and will disregard any changes that have been made.

Required Information: Some tables of data will have fields that must be filled in. These fields are colored yellow. If all yellow fields are not filled in, you will be unable to save the information you have entered. After you click “Ok”, the unfilled, required fields will be colored red. These are the fields that must be completed to continue.

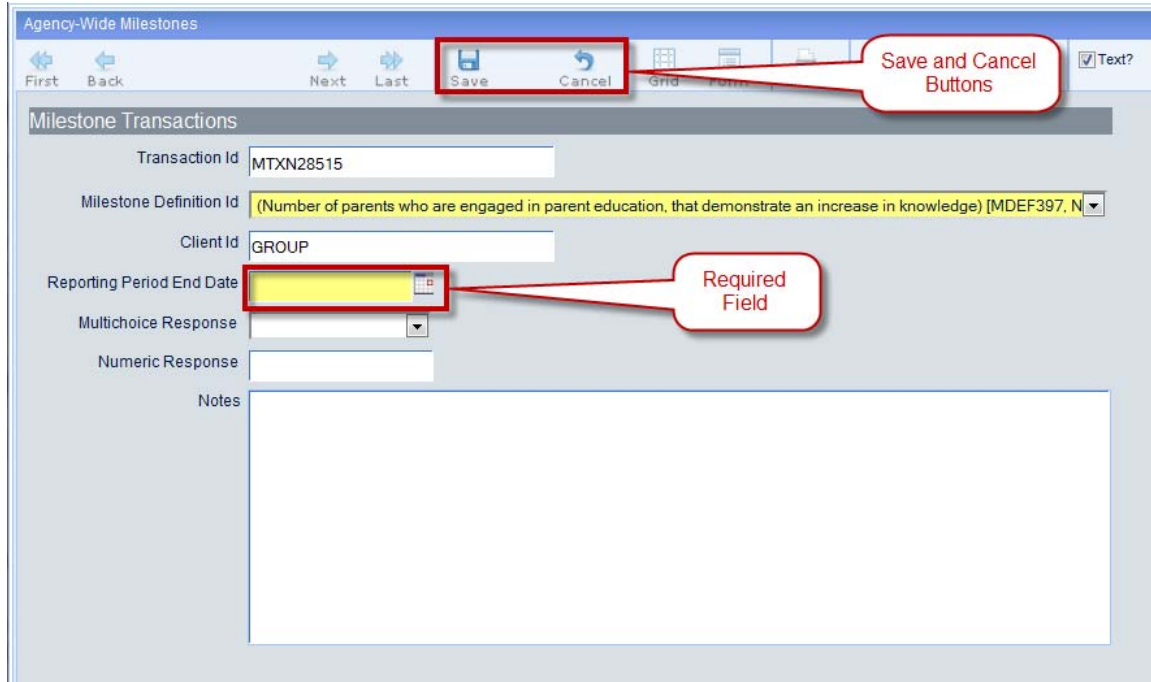
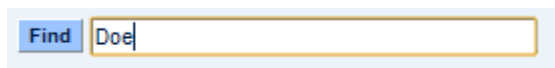
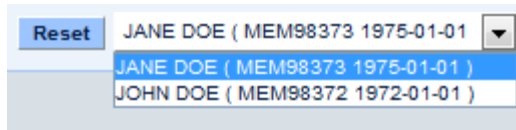


Figure 6: Required Fields and Save/Cancel Buttons

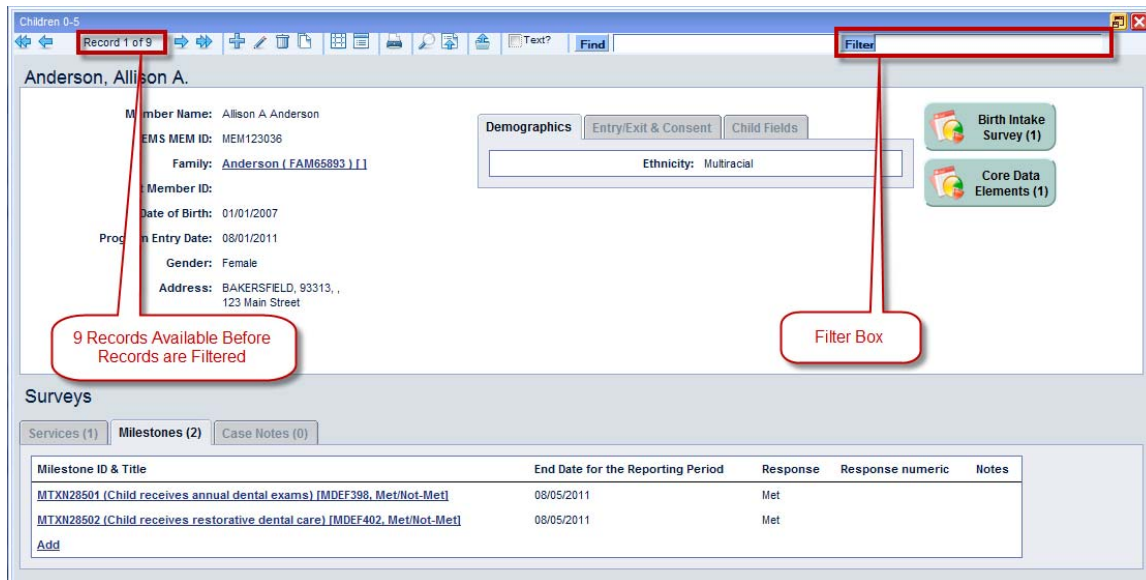
Find - The Find feature allows you to quickly and easily find records in a table. You should simply type the search criteria in the field to the right of the blue "Find" button, then click "Find" to fetch the data.



The system will navigate to the first record that matches the search term. A drop-down will appear in the place of the text field, which will display all of the search results. Selecting a record will automatically navigate the system to the record selected. To reset the search, simply click "Reset" and type in a new search term.



Filter - The filter operation allows you to limit the dataset that is visible from the table that appears in the module. This is a very useful tool when you want to view certain information without seeing all available records. To use the Filter option, type a filter term in the text field to the right of the blue "Filter" button. Once you click "Filter", the filtered records will appear.



Children 0-5

Record 1 of 9

Find

Filter

Anderson, Allison A.

Member Name: Allison A Anderson

GEMS MEM ID: MEM123036

Family: [Anderson \(FAM65893 \) \[1\]](#)

Member ID:

Date of Birth: 01/01/2007

Program Entry Date: 08/01/2011

Gender: Female

Address: BAKERSFIELD, 93313, ,
123 Main Street

Demographics

Entry/Exit & Consent

Child Fields

Ethnicity: Multiracial

Birth Intake Survey (1)

Core Data Elements (1)

9 Records Available Before Records are Filtered

Filter Box

Surveys

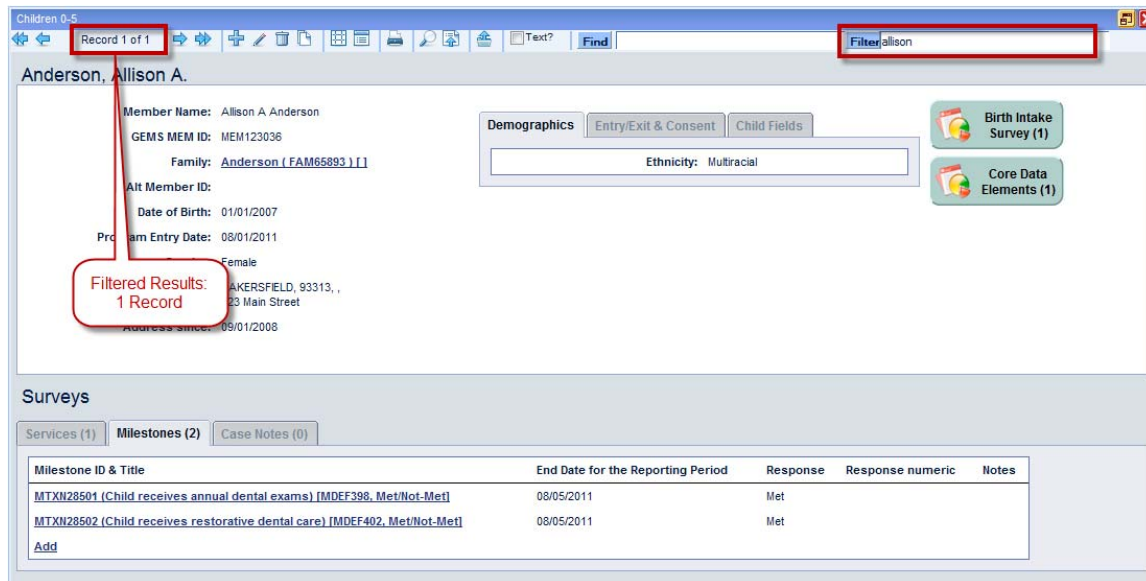
Services (1) Milestones (2) Case Notes (0)

Milestone ID & Title	End Date for the Reporting Period	Response	Response numeric	Notes
MTXN28501 (Child receives annual dental exams) [MDEF388, Met/Not-Met]	08/05/2011	Met		
MTXN28502 (Child receives restorative dental care) [MDEF402, Met/Not-Met]	08/05/2011	Met		

Add

Figure 7: Filter Operation

The dataset is shortened after you have selected the filter criteria. Rather than looking at all available records, you have now narrowed your visible records to just one. The navigation and operations will now treat the dataset as if it was just the filtered records.



Children 0-5

Record 1 of 1

Find

Filter allison

Anderson, Allison A.

Member Name: Allison A Anderson

GEMS MEM ID: MEM123036

Family: [Anderson \(FAM65893 \) \[1\]](#)

Alt Member ID:

Date of Birth: 01/01/2007

Program Entry Date: 08/01/2011

Gender: Female

Address: BAKERSFIELD, 93313, ,
123 Main Street

Demographics

Entry/Exit & Consent

Child Fields

Ethnicity: Multiracial

Birth Intake Survey (1)

Core Data Elements (1)

Filtered Results: 1 Record

Surveys

Services (1) Milestones (2) Case Notes (0)

Milestone ID & Title	End Date for the Reporting Period	Response	Response numeric	Notes
MTXN28501 (Child receives annual dental exams) [MDEF388, Met/Not-Met]	08/05/2011	Met		
MTXN28502 (Child receives restorative dental care) [MDEF402, Met/Not-Met]	08/05/2011	Met		

Add

Figure 8: Filter Results

To remove the filter and return to all available records, you must remove all text from the filter text field, and then click the "Filter" button again. This is important as the filter will remain on the dataset even after you have logged out of the system. If this step is not completed, you may find that your dataset is empty. If this occurs, reset the filter to return to all available records.

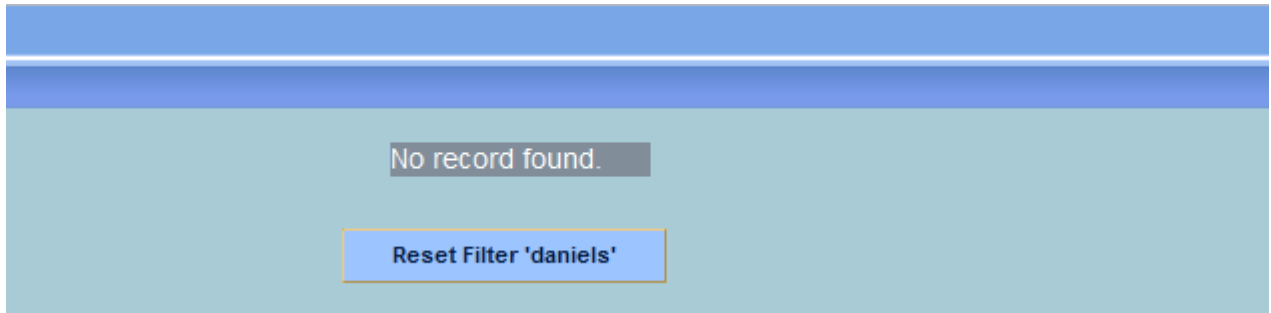


Figure 9: Reset Filter

Error Message: If you attempt to save your changes with at least one required field left blank or with erroneous data, an error message will appear. This will indicate that there is required information missing from the record that must be updated in order to proceed.

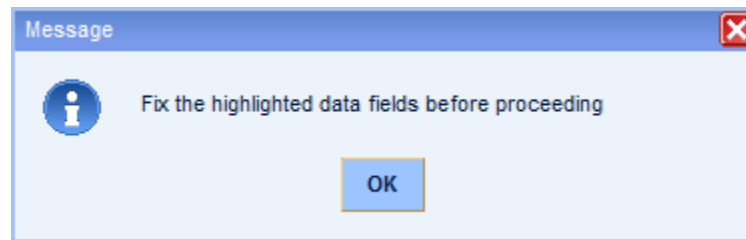


Figure 10: Example Error Message

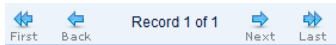
Access Levels

Because GEMS allows various access levels for different users, certain GEMS functionalities may or may not be available to each GEMS user. Access levels for First 5 Kern fall into the following three categories.

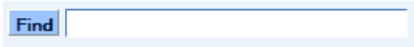
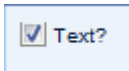
- **Level 1:** System-wide read-only access with full report printing capacity – funder side
- **Level 2:** With Specified Access Rights (funder side)
 - Research and Evaluation Staff: Full user rights to data access and exports
 - Finance Staff: Full user rights to fiscal access
 - Program Staff: Full user rights to program defined activities
- **Level 3:** Full Functionality – funder side

GEMS DATABASE TOOLBAR

The table below provides a description of each *Database Toolbar* icon and its functions in GEMS.

<u>GEMS Data Toolbar Options</u>			
Database Toolbar Option	Toolbar Icon	Appears When?	Function
Data Navigation		In Browse mode	Arrows take user to the first record in the table (double left arrow), to the previous record (single left arrow), to the next record (single right arrow) or the last record (double right arrow).
Data Modification-Add New		In Browse mode	Adds a new record to the existing table. In this case, the <i>Status Message</i> reflects the addition of the new record by adding one to the last value of the record.
Data Modification-Modify Current		In Browse mode	Allows user to edit the current record.
Data Modification-Delete Current		In Browse mode	Allows user to delete the current record.

<u>GEMS Data Toolbar Options</u>			
Database Toolbar Option	Toolbar Icon	Appears When?	Function
Data Modification- Copy to New	 Copy	In Browse mode	Copies the current record and creates a new record with the identical information.
Data Modification- Save	 Save	In Edit mode	Save the information the user has entered into the data fields.
Data Modification- Cancel	 Cancel	In Edit mode	Cancels the current action that user is completing.
Data View- Form	 Form	In Browse mode	Presents data fields as a form (default view).
Data View- Grid	 Grid	In Browse mode	Presents data fields as grid view.
Data Printing- Preview	 Print	In Browse mode	Opens a window that provides a print preview of the current screen.
Advanced Functions- Find	 Find	In Browse mode	The button opens a wizard that allows the user to find the record that matches the criteria selected.

<u>GEMS Data Toolbar Options</u>			
Database Toolbar Option	Toolbar Icon	Appears When?	Function
Advanced Functions- Sort		In Browse mode	This button reorders the records in the database according to the criteria selected by the user.
Advanced Functions- Export		In Browse mode	This button opens a wizard that allows the user to export the records that match the selected criteria
Quick Find		In Browse mode	Enter text into the blank box beside the Find icon. This allows you to quickly search through records in the current module.
Add Text		In all modes	Checking this box causes explanatory text to appear beneath the toolbar icons.

ADVANCED OPERATIONS IN DATABASE TOOLBAR

The *Database Toolbar*, as introduced above, contains the following advanced operations:

1. **Advanced Find** allows you to find a specific record.
2. **Advanced sort** allows you to order your database on multiple criteria of your choice.
3. **Export** allows you to export data based on the criteria you have chosen (filtered report)

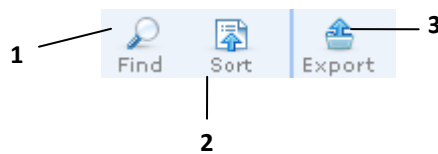


Figure 11: Advanced Data Function Tools (1) Find, (2) Sort, and (3) Export

Advanced Find

The button opens a wizard that allows you to find the record that matches the criteria selected. This wizard takes you through the following steps:

1. *Enter find parameter:* You choose from the parameters available in a given panel. For example, under the *Family Details* panel, Family ID is an available parameter. If the field in the table is of type “LoV,” then the system displays a small button beside the criteria box. Once you have chosen the desired criteria to search, proceed by clicking “Next.” If you want to clear previously selected criteria, click “Clear All” to start afresh. Clicking “Cancel” will close the wizard.
2. *Find Results:* The system then displays the records that match the criteria in a spreadsheet view. You can click on the desired record and the system will display the corresponding record in the background. Clicking “Finish” closes the wizard.

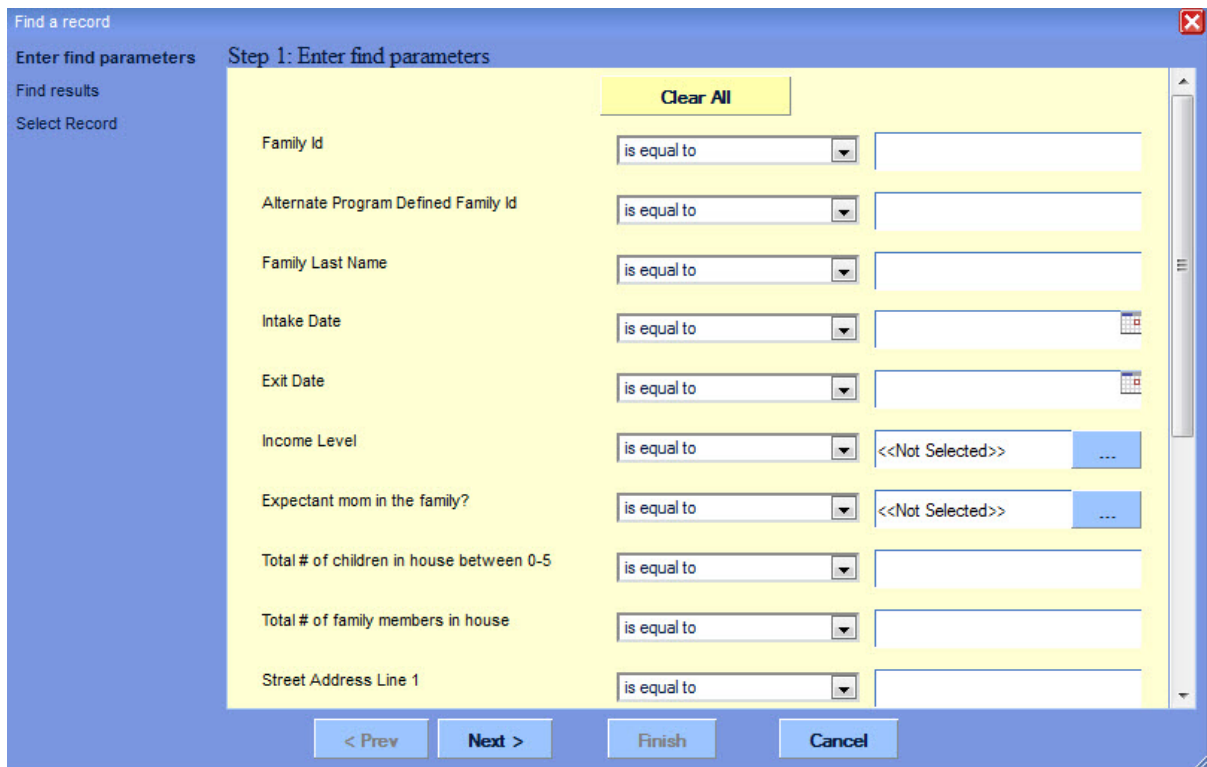


Figure 12: Step 1-Enter Find Parameters

Advanced Sort

This button reorders the records in the database according to the criteria you selected. This wizard takes you through the following steps:

1. *Select columns to sort on:* You choose from the fields available in a given panel; these fields will be the same as the fields listed in the records you are attempting to sort.
2. *Select sort order:* In the next screen identify the specific order (Ascending/Descending) for the records. You can also move the selected sort criteria up and down in the list by selecting the field and pressing “Up” or “Down”. This order determines the sorting preference. Clicking “Next” sorts the database in the desired order and the wizard confirms the same.

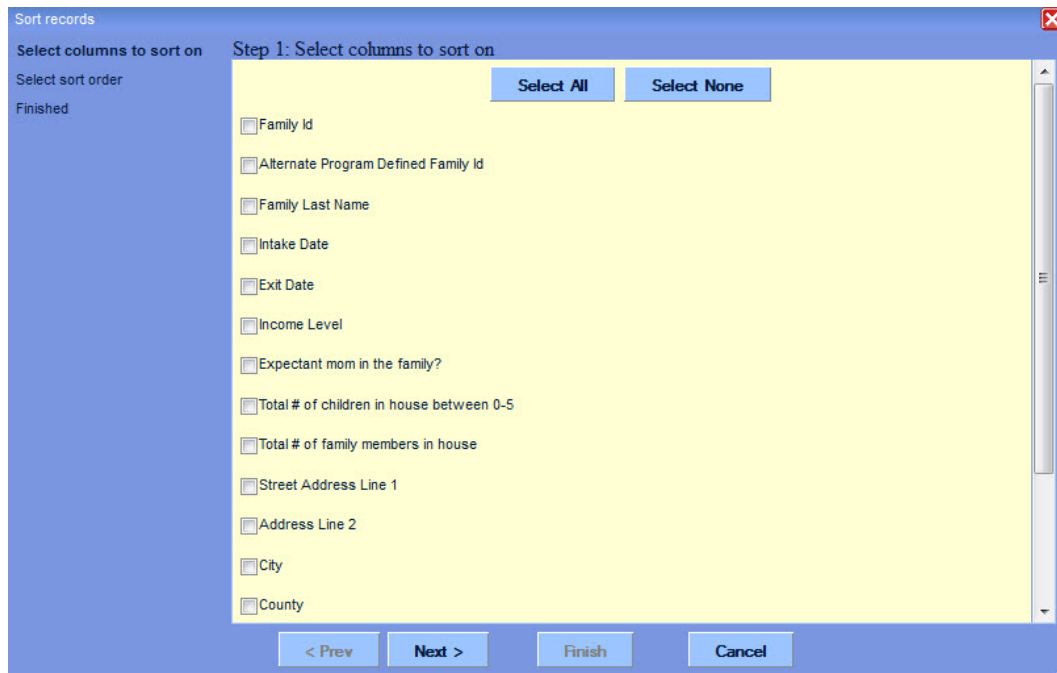


Figure 13: Selecting sort order and preference

3. Click “Finish” to bring up the sorted database.

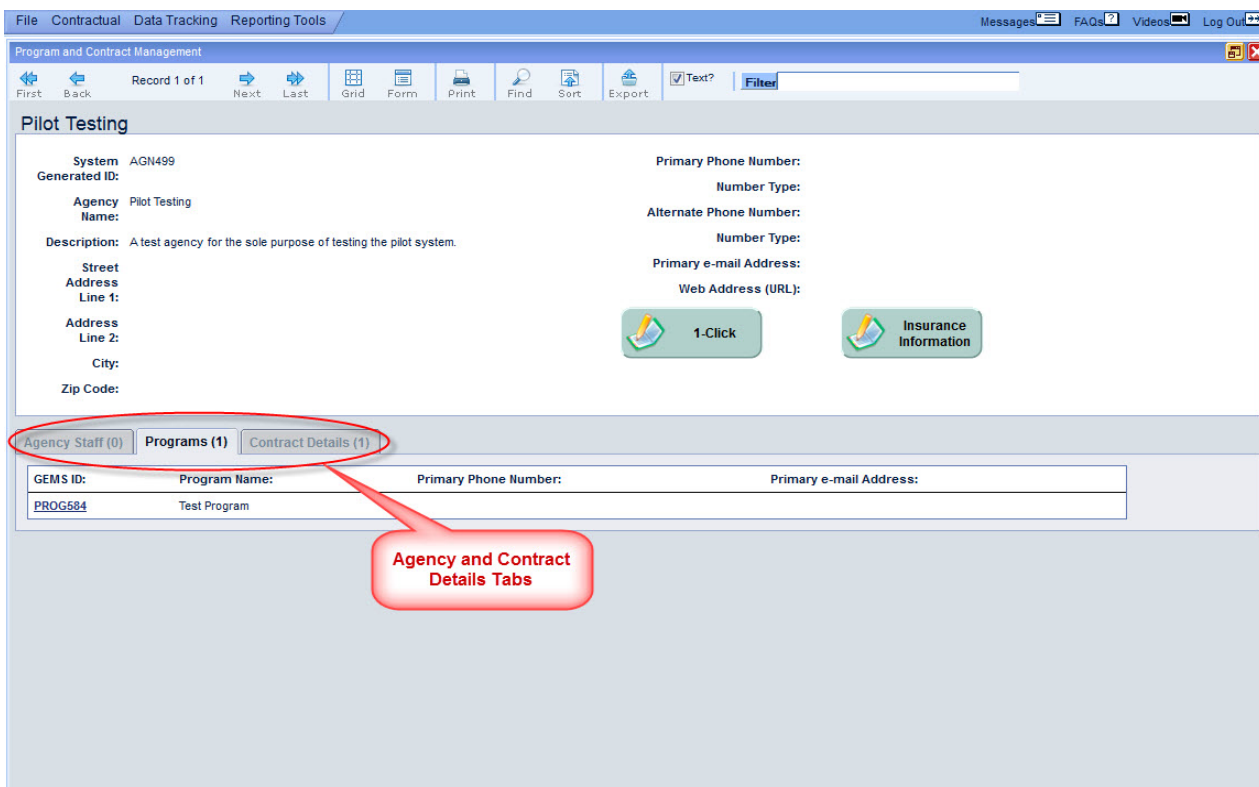
CONTRACT ADMINISTRATION

AGENCY AND CONTRACT DETAILS MODULE

The *Agency and Contract Details* module will display information about your program and individual contract. This module will also provide information about the programs being implemented and staff assigned to the contract. These details are established by the Commission staff and are, therefore, read only. To access the *Agency and Contract Details* module, simply click on the menu item as seen below.



Once you have selected *Agency and Contract Details* from the menu, you will be directed to the module below. This module consists of recorded data in the upper portion and three tabs in the lower portion. Each of these tabs of information is typically used as a reference tool and contains information specific to your mission.



File **Contractual** **Data Tracking** **Reporting Tools** Messages FAQs Videos Log Out

Program and Contract Management

First Back Record 1 of 1 Next Last Grid Form Print Find Sort Export ☒ Text? Filter

Pilot Testing

System: AGN499
Generated ID:
Agency Name: Pilot Testing
Description: A test agency for the sole purpose of testing the pilot system.
Street Address Line 1:
Address Line 2:
City:
Zip Code:

Primary Phone Number:
Number Type:
Alternate Phone Number:
Number Type:
Primary e-mail Address:
Web Address (URL):

 1-Click  Insurance Information

Agency Staff (0) **Programs (1)** Contract Details (1)

GEMS ID:	Program Name:	Primary Phone Number:	Primary e-mail Address:
PROG584	Test Program		

Agency and Contract Details Tabs

Figure 14: Agency and Contract Details Module

Agency Staff: This screen contains specific data on the employees appointed to the program, including contact and demographic information. To navigate through the staff record, simply click “Next” or “Back”.

Programs: The Programs tab lists all programs to which you are assigned. This allows you to access information on the specific programs for which you are responsible. You are able to navigate through the programs listed by using the “Next” or “Back” buttons.

Contract Details: This tab allows information on each contract to be viewed, including: Contract Number, Begin and End dates, and the Involved Staff Members.

SCOPE OF WORK AND EVALUATION PROFILE MODULE

The *Scope of Work and Evaluation Profile* module will provide you with details on specific services, targets, surveys and milestones involved in your assignments. These details are established by the Commission staff and are, therefore, read only. To access the *Scope of Work and Evaluation Profile*, simply click on the menu item as seen below.



Once you have selected *Scope of Work and Evaluation Profile* from the menu, you will be directed to the screen displayed below. This module includes four tabs of information that appear vertically, allowing you to view all the information in a single scrollable screen. The first tab listed is labeled "Services."

Services: The *Services* tab includes a listing of all services the Program provides, such as *Developmental Screening* and *Community Outreach Events*. Services are organized by columns, the first of which is the *Service ID*. This is simply the reference number given to the specific service. The second column, *Assignment: Service Title*, provides you with the title of the service provided. By clicking on individual *Service IDs* or *Service Titles*, you can access more detailed information. The third column indicates the method, or *Modality* of the service. The *Modality* specifies the way the service is administered, such as in a Classroom or through a Home Visit. The fourth column measures the units in which the service can be measured, such as by number of classes, series of classes or number of days. The fifth column, labeled *Current*, simply indicates whether the service is active. If the *Current* column reads "true," then that service is currently active.

Contract SOW and Evaluation Profile

Record 1 of 1

First Back Next Last Grid Form Print Find Sort Export Text? Filter

Services (16)

Definition: Service ID	Assignment: Service Title	Modality	Units	Current
SRV27	(QID) Infant/Toddler ECE (Days)	Classroom	Class	true
SRV79	Developmental screening	Home visit	Client Contact	true
SRV109	Targeted case management (Hours)	Cash Grant	Days	true
SRV110	ECE provider workshops (Hours)	Home visit	Days	true
SRV75	ECE provider stipends	Participant Training Grant	Phone Calls	true
SRV77	Community outreach events	Days	Days	true
SRV109	Information & referral (Phone)	Series of Classes	Client Contact	true
SRV110	Information & referral (Consult)	Cash Grant	Days	true
SRV75	Case management referrals	Classroom	I&R Calls	true
SRV77	ECE provider stipends (Classes) Aggregate	Home visit	Class	true
SRV233	ECE provider stipends (Hours) Aggregate	Classroom	Class	true
SRV174	Mosaic Test Service data	Cash Grant	Client Contact	false
SRV229	Mosaic Test Service data	Cash Grant	Client Contact	true
SRV2770	Mosaic Test Service data	Cash Grant	Client Contact	true
SRV2771	Mosaic Test Service data	Cash Grant	Client Contact	true
SRV2774	Local School Readiness Classes for Happy Toddler Care	Classroom	Class	true

Figure 15: Services Tab

Surveys: The *Surveys* tab includes specific information on surveys that are part of your assignment. Survey data is listed in three columns, the first of which is the *Survey ID*. This is simply the identification number given to each survey. The second column, *Assignment: Survey Name*, lists the Survey Assignment. By clicking on either a specific *Survey ID* or *Survey Name*, you can access specific information about the survey. The third column, *Survey Title*, provides you with the title of the survey if different than the *Survey Name*.

Surveys (4)

Definition: Survey ID	Assignment: Survey Name	Survey Title
PDF479	Initial Outcomes	
PDF480	Score Data Elements	
PDF481	Initial Outcomes	
PDF482	Score Data Elements	
PDF483	Initial Outcomes	
PDF484	Score Data Elements	
PDF485	Initial Outcomes	
PDF486	Score Data Elements	
PDF487	Initial Outcomes	
PDF488	Score Data Elements	
PDF489	Initial Outcomes	
PDF490	Score Data Elements	
PDF491	Initial Outcomes	
PDF492	Score Data Elements	
PDF493	Initial Outcomes	
PDF494	Score Data Elements	
PDF495	Initial Outcomes	
PDF496	Score Data Elements	
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PDF575	Initial Outcomes	
PDF576	Score Data Elements	
PDF577	Initial Outcomes	
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PDF579	Initial Outcomes	
PDF580	Score Data Elements	
PDF581	Initial Outcomes	
PDF582	Score Data Elements	
PDF583	Initial Outcomes	
PDF584	Score Data Elements	
PDF585	Initial Outcomes	
PDF586	Score Data Elements	
PDF587	Initial Outcomes	
PDF588	Score Data Elements	
PDF589	Initial Outcomes	
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PDF591	Initial Outcomes	
PDF592	Score Data Elements	
PDF593	Initial Outcomes	
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PDF768	Score Data Elements	
PDF769	Initial Outcomes	
PDF770	Score Data Elements	
PDF771	Initial Outcomes	
PDF772	Score Data Elements	
PDF773	Initial Outcomes	
PDF774	Score Data Elements	
PDF775	Initial Outcomes	
PDF776	Score Data Elements	
PDF777	Initial Outcomes	
PDF778	Score Data Elements	
PDF779	Initial Outcomes	
PDF780	Score Data Elements	
PDF781	Initial Outcomes	

projected. Beginning and end dates simply indicate the time period associated with the target. The final column, labeled *Current*, specifies whether the service is active. If the *Current* column reads "true," then that service is currently active.

Milestones: The *Milestones* tab provides you with information on your individual Milestones, or specific goals. Milestones are typically very specific, outlining the steps required to meet your Targets. The Milestones tab is divided by columns, the first of which is labeled *Definition: Milestone ID*. This simply refers to the reference number given to each specific milestone. The second column, *Assignment: Milestone Title*, specifies the details of the milestone. You can access additional information on each milestone by clicking on either the individual *Milestone ID* or the *Milestone Title*. The third column, *Projection Type*, indicates the type of response required. For example, a response could be met/not met, or expressed numerically. The final column, labeled *Current*, specifies whether the milestone is active. If the *Current* column reads "true," then that milestone is currently active.

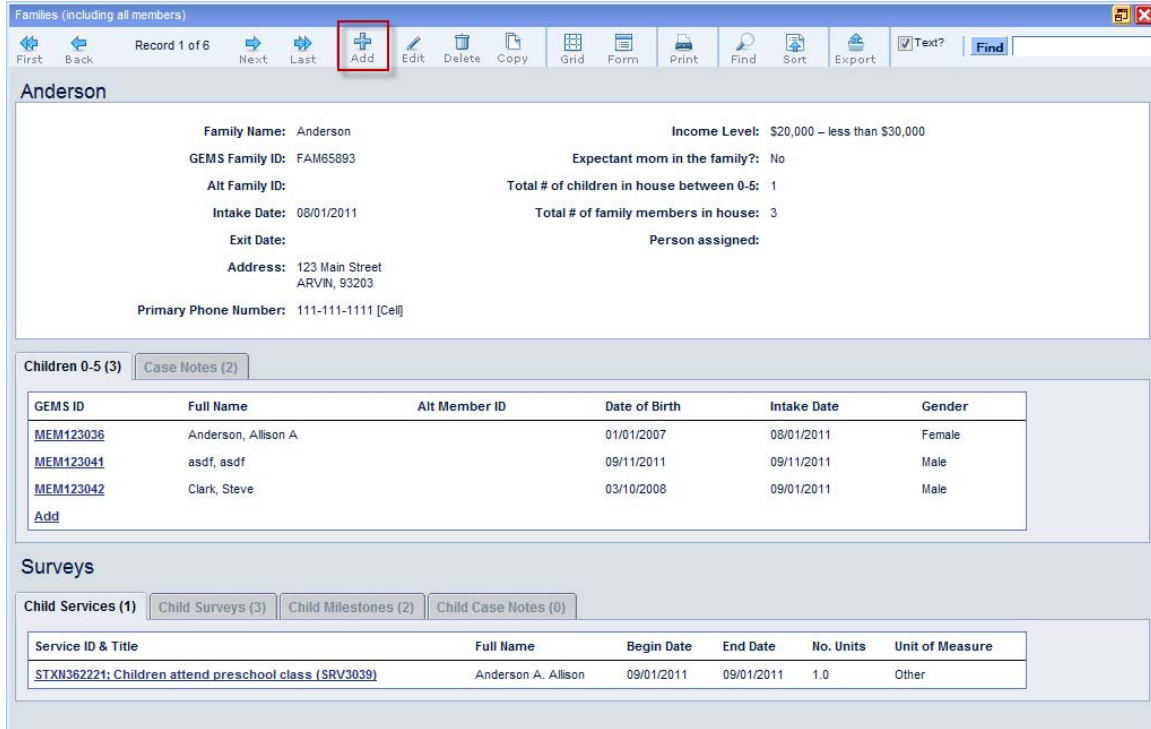
CLIENTS, SERVICES, AND OUTCOMES

FAMILIES (INCLUDING ALL MEMBERS) MODULE

To add a new child or client into GEMS, simply click on the menu item as seen below.



After clicking on the *Families* module link, you will be directed to the screen below. To add a new child or family into GEMS, simply click "Add".



Families (including all members)

Record 1 of 6

Anderson

Family Name: Anderson
 GEMS Family ID: FAM65893
 Alt Family ID:
 Intake Date: 08/01/2011
 Exit Date:
 Address: 123 Main Street
 ARVIN, 93203
 Primary Phone Number: 111-111-1111 [Cell]

Income Level: \$20,000 – less than \$30,000
 Expectant mom in the family?: No
 Total # of children in house between 0-5: 1
 Total # of family members in house: 3
 Person assigned:

Children 0-5 (3) Case Notes (2)

GEMS ID	Full Name	Alt Member ID	Date of Birth	Intake Date	Gender
MEM123036	Anderson, Allison A.		01/01/2007	08/01/2011	Female
MEM123041	asdf, asdf		09/11/2011	09/11/2011	Male
MEM123042	Clark, Steve		03/10/2008	09/01/2011	Male

Add

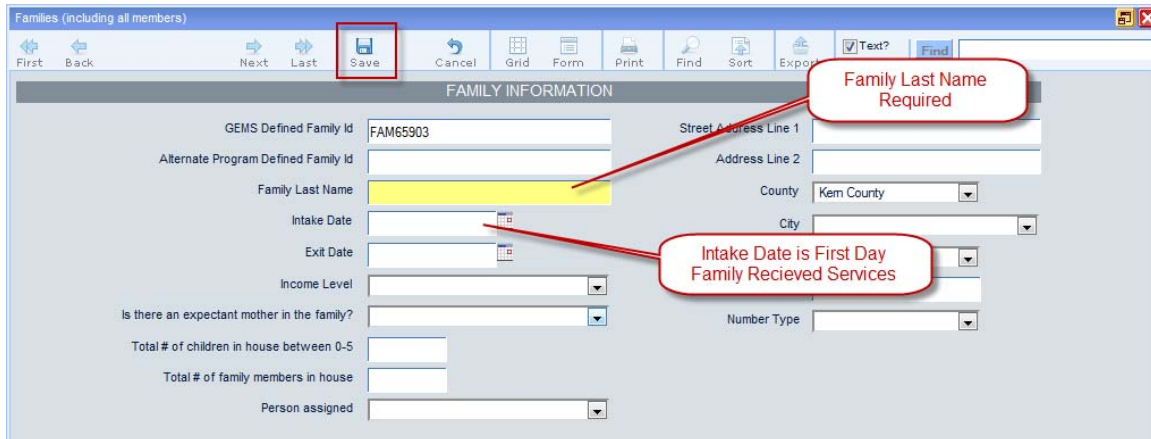
Surveys

Child Services (1) Child Surveys (3) Child Milestones (2) Child Case Notes (0)

Service ID & Title	Full Name	Begin Date	End Date	No. Units	Unit of Measure
STXN362221: Children attend preschool class (SRV3039)	Anderson A. Allison	09/01/2011	09/01/2011	1.0	Other

Figure 17: Add Family to Records

This will direct you to the screen displayed below. The new family will automatically be assigned a unique *GEMS ID* number. If you have an alternate ID number specific to your Program, we suggest you enter this information in the *Alternate ID* field. This will help you locate the record when you search for it later. Mandatory fields are colored yellow, meaning you will be unable to save any information unless you complete all the required fields. If you are adding a child into the system, you will need to assign them to a family in GEMS. This does not require you to provide detailed information on the family, but simply a name with which siblings can be connected. Although not all fields are required, you should strive to complete as many as possible. This will provide the tools to produce more detailed reports and statistics on the children in the system. To save the new entry, simply click “Save”.



Families (including all members)

Record 1 of 6

Save

FAMILY INFORMATION

GEMS Defined Family Id: FAM65903
 Alternate Program Defined Family Id:
 Family Last Name: [REDACTED]
 Intake Date: [REDACTED]
 Exit Date: [REDACTED]
 Income Level: [REDACTED]
 Is there an expectant mother in the family?: [REDACTED]
 Total # of children in house between 0-5: [REDACTED]
 Total # of family members in house: [REDACTED]
 Person assigned: [REDACTED]

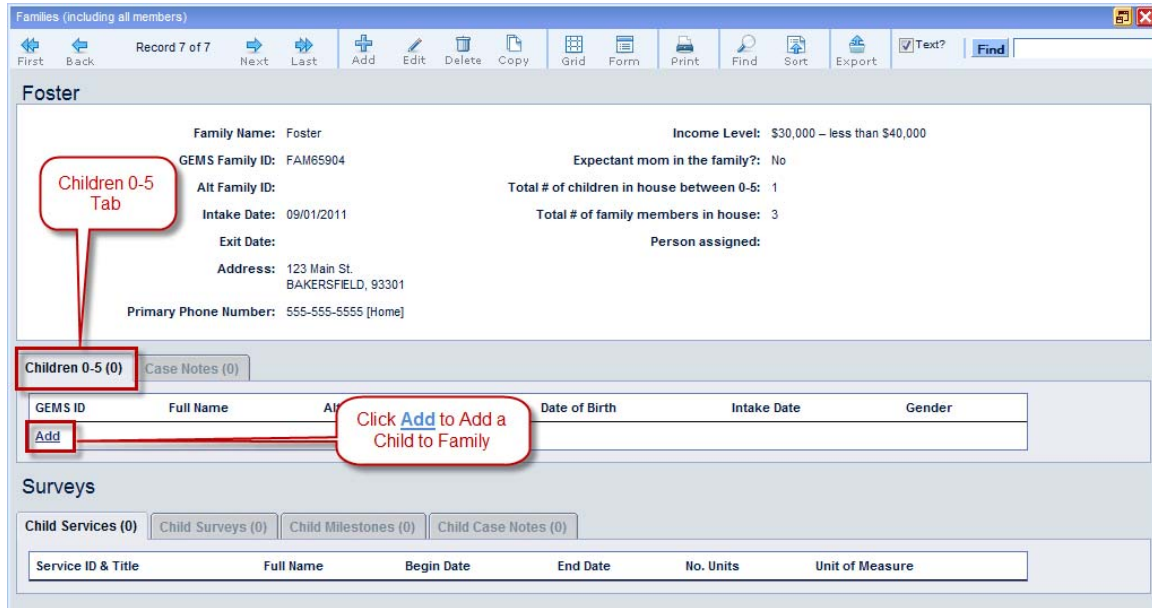
Street Address Line 1: [REDACTED]
 Address Line 2: [REDACTED]
 County: Kern County
 City: [REDACTED]
 Number Type: [REDACTED]

Family Last Name Required

Intake Date is First Day Family Received Services

Figure 18: Save New Family Data

Once you have saved your information, you will be directed to the screen below. The family name, GEMS ID and any other information you have entered will appear in the top portion of the screen. To add a child to the family, simply click “Add”.



Families (including all members)

Record 7 of 7

Foster

Family Name: Foster Income Level: \$30,000 – less than \$40,000

GEMS Family ID: FAM65904 Expectant mom in the family?: No

Alt Family ID: Total # of children in house between 0-5: 1

Intake Date: 09/01/2011 Total # of family members in house: 3

Exit Date: Person assigned:

Address: 123 Main St.
BAKERSFIELD, 93301

Primary Phone Number: 555-555-5555 [Home]

Children 0-5 (0) Case Notes (0)

GEMS ID	Full Name	Alt	Date of Birth	Intake Date	Gender
Add					

Click Add to Add a Child to Family

Surveys

Child Services (0) Child Surveys (0) Child Milestones (0) Child Case Notes (0)

Service ID & Title	Full Name	Begin Date	End Date	No. Units	Unit of Measure
--------------------	-----------	------------	----------	-----------	-----------------

Figure 19: Add New Child to Family Record

After clicking “Add,” you will be directed to the screen below. The new child will automatically be assigned a unique *GEMS ID* number. If you have an alternate ID number specific to your Program, we suggest you enter this information in the *Alternate ID* field. This will help you locate the record when you search for it later. There are several required fields when adding a new child that must be completed before saving. After you enter the child's general information (name, gender, date of birth and mother's first name), GEMS will ask you to check to see if this child has already been added into the system. Doing this will avoid any duplication. Providing the child does not already exist in GEMS, simply complete the form and click “Save.”

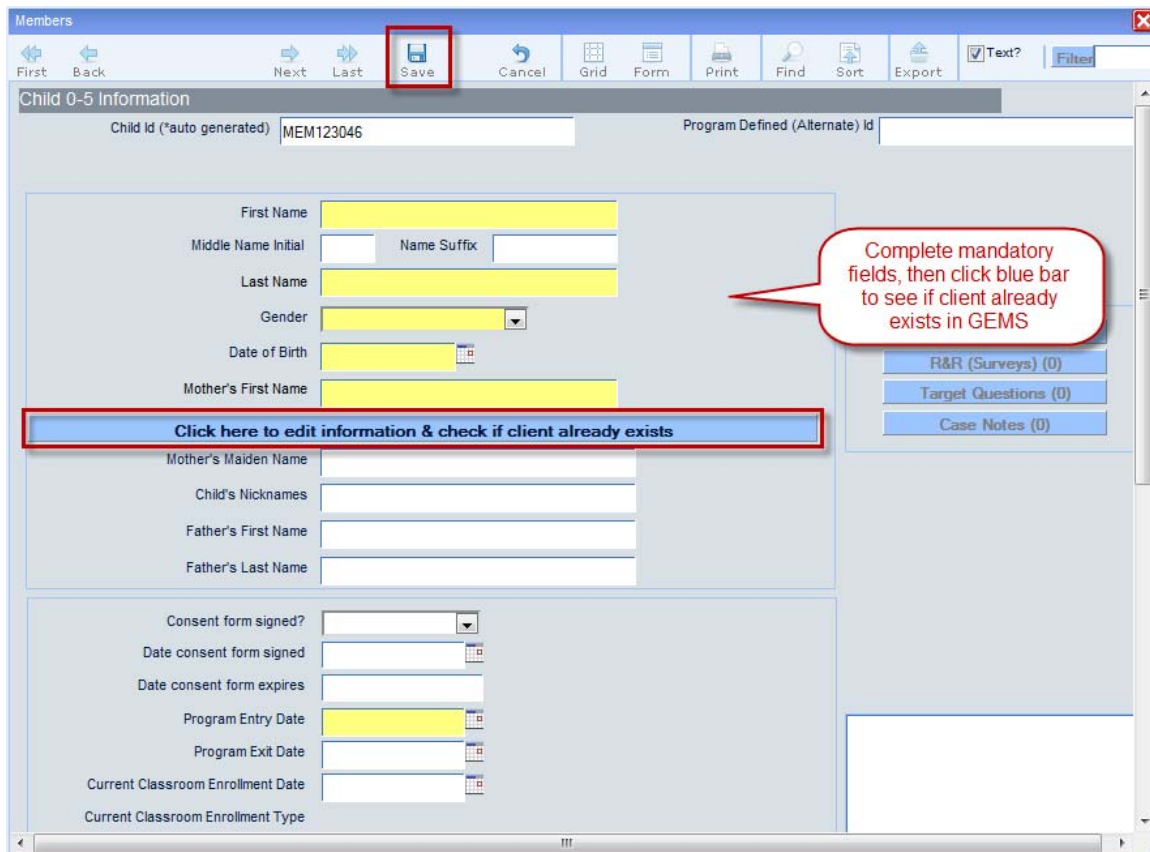


Figure 20: Save New Child Record After Mandatory Data Fields are Completed

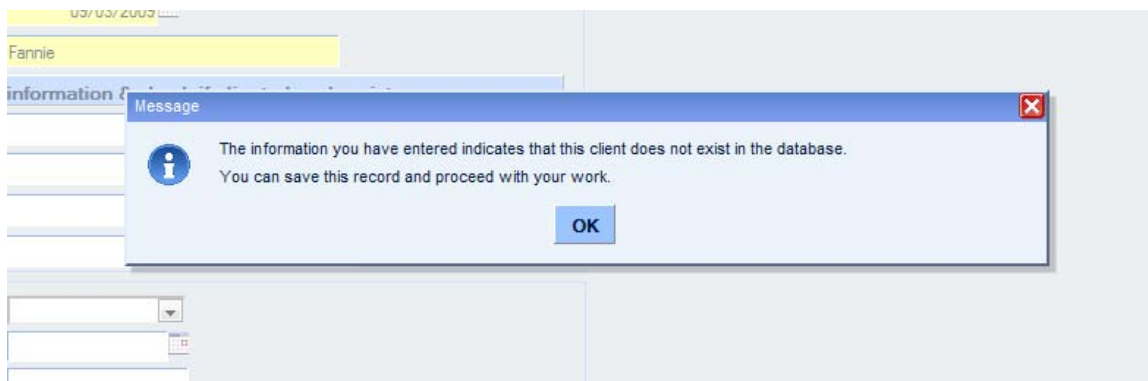
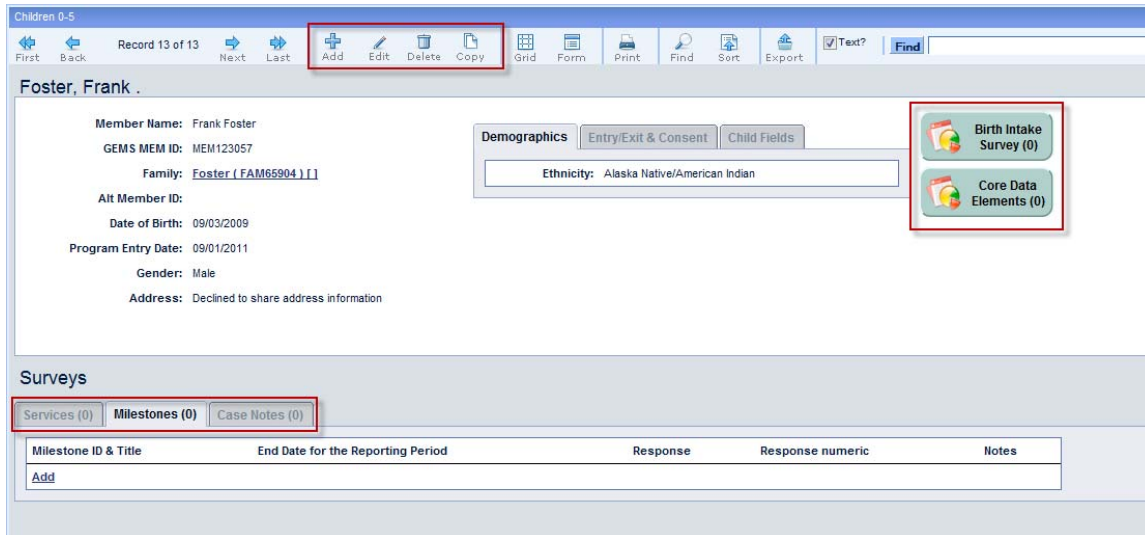


Figure 21: Verify That the Entered Information Does Not Already Exist in the Database

After you have saved your information, you will arrive at the screen displayed below. From here, you can enter *Surveys*, *Milestones*, and *Case Notes* to the child's record by simply clicking on the tabs located in the lower portion of the screen. To view or edit *Entry/Exit information*, *Demographics*, or *Child Fields*, click on the tabs in the middle portion of the screen. The Pop-out buttons on the right portion of the screen allow you quick access to the *Birth Intake Survey* and the *Core Data Elements* form.



Children 0-5

Record 13 of 13

First Back Next Last

Add Edit Delete Copy

Grid Form Print Find Sort Export

Text? Find

Foster, Frank .

Member Name: Frank Foster

GEMS MEM ID: MEM123057

Family: Foster (FAM65904) []

Alt Member ID:

Date of Birth: 09/03/2009

Program Entry Date: 09/01/2011

Gender: Male

Address: Declined to share address information

Demographics Entry/Exit & Consent Child Fields

Ethnicity: Alaska Native/American Indian

Birth Intake Survey (0)

Core Data Elements (0)

Surveys

Services (0) Milestones (0) Case Notes (0)

Milestone ID & Title	End Date for the Reporting Period	Response	Response numeric	Notes
Add				

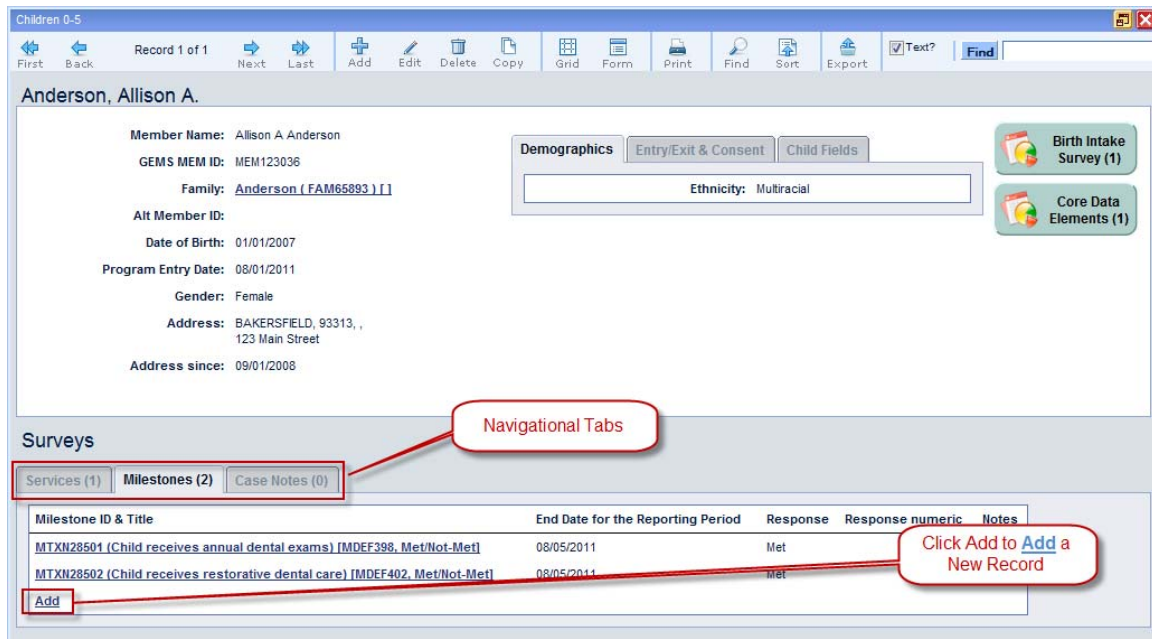
Figure 22: Child Record Screen Overview

CHILDREN 0-5 MODULE

The *Children 0-5* module provides you with direct access to information on the children enrolled in the system. This module is similar to the Families module in that it provides access to several of the same fields. The *Children 0-5* module, however, focuses primarily on a specific child rather than the family as a whole. To access the *Children 0-5* module, simply click on the menu item as seen below.



Once you have selected the *Children 0-5* module, you will be directed to the screen displayed below. From here, you can add or edit information such as *Core Data Elements*, *Initial Outcomes*, and *Entry/Exit data*. You can also add notes by clicking on the "Case Notes" tab located at the bottom of the screen.



Children 0-5

Record 1 of 1

Anderson, Allison A.

Member Name: Allison A Anderson
 GEMS MEM ID: MEM123036
 Family: Anderson (FAM65893) [1]
 Alt Member ID:
 Date of Birth: 01/01/2007
 Program Entry Date: 08/01/2011
 Gender: Female
 Address: BAKERSFIELD, 93313, ,
 123 Main Street
 Address since: 09/01/2008

Demographics | Entry/Exit & Consent | Child Fields

Ethnicity: Multiracial

Birth Intake Survey (1)
 Core Data Elements (1)

Surveys

Services (1) | Milestones (2) | Case Notes (0)

Milestone ID & Title	End Date for the Reporting Period	Response	Response numeric	Notes
MTXN28501 (Child receives annual dental exams) [MDEF398, Met/Not-Met]	08/05/2011	Met		
MTXN28502 (Child receives restorative dental care) [MDEF402, Met/Not-Met]	08/05/2011	Met		

Add

Click Add to Add a New Record

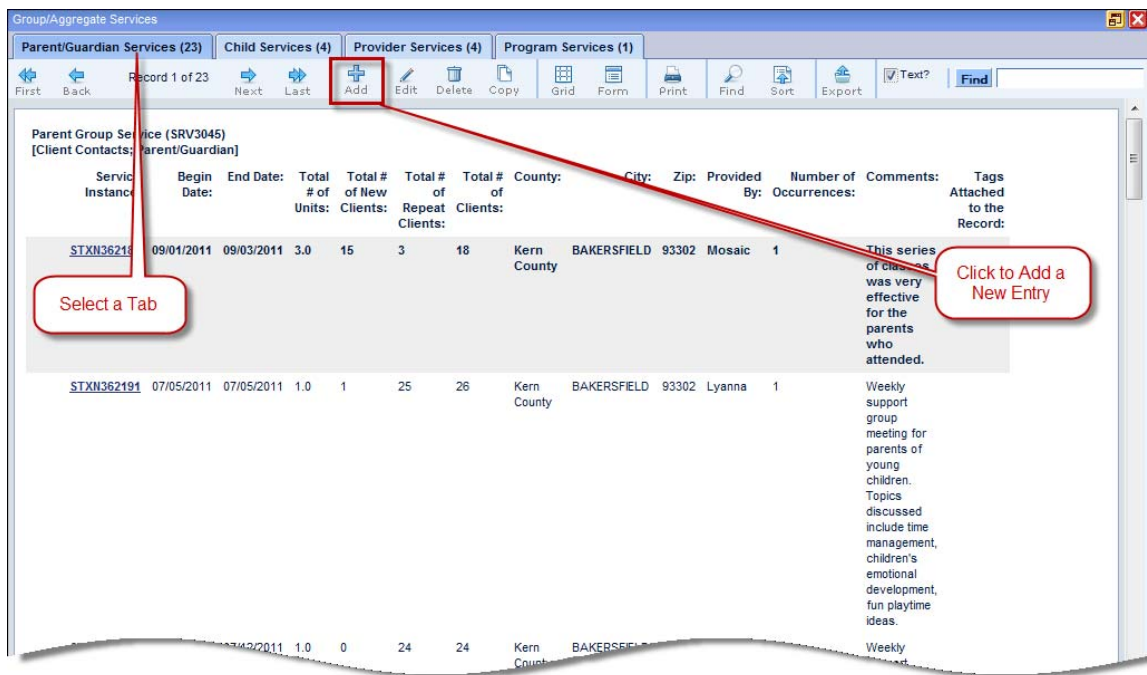
Figure 23: Use Navigational Tabs to Edit/Add Information on Services, Milestones, and Case Notes

GROUP/AGGREGATE SERVICES MODULE

The *Group/Aggregate Services* module allows you to add and modify aggregate service transactions. To access the *Group/Aggregate Services* module, simply click on the menu item as seen below.



Once you have selected the *Group/Aggregate Services* module from the menu, you will be directed to the screen displayed below. The screen is comprised of tabs describing the clients served such as *Parent/Guardian Services* or *Child Services*. To add a new entry, select the appropriate tab and click "Add."



Group/Aggregate Services

Parent/Guardian Services (23) Child Services (4) **Provider Services (4)** Program Services (1)

First Back Record 1 of 23 Next Last Add Edit Delete Copy Grid Form Print Find Sort Export Text? Find

Parent Group Service (SRV3045)
[Client/Contacts: Parent/Guardian]

Service Instance	Begin Date	End Date	Total # of Units	Total # of New Clients	Total # of Repeat Clients	Total # of Clients	County	City	Zip	Provided By	Number of Occurrences	Comments	Tags Attached to the Record
STXN362191	09/01/2011	09/03/2011	3.0	15	3	18	Kern County	BAKERSFIELD	93302	Mosaic	1	This series of classes was very effective for the parents who attended.	
STXN362191	07/05/2011	07/05/2011	1.0	1	25	26	Kern County	BAKERSFIELD	93302	Lyanna	1	Weekly support group meeting for parents of young children. Topics discussed include time management, children's emotional development, fun playtime ideas.	

Figure 24: Add New Entry to Group/Aggregate Services

After you click “Add,” you will be directed to the screen below. GEMS will automatically assign a unique *Transaction ID* that can be seen in the upper portion of the screen. To update your aggregate service, simply select the service from the drop box. Included in the drop-down box will be all aggregate services and milestones that are assigned to your contract. For each, simply enter the beginning and end dates of the service (typically, the first and last day of the month) and fill in the total number of services provided. This number will be related to the number of clients that attended each service. For example, one class containing 20 students would be considered 20 services. When completing the number of clients section, simply include the number of repeat clients (clients who have taken part in the service previously) and the number of new clients (clients who have never taken part in the service before). GEMS will automatically populate the total number of clients based on the sum of these two boxes. If you have any case notes, simply enter them in the *Case Notes* section. When you have completed the form, click “Save.”

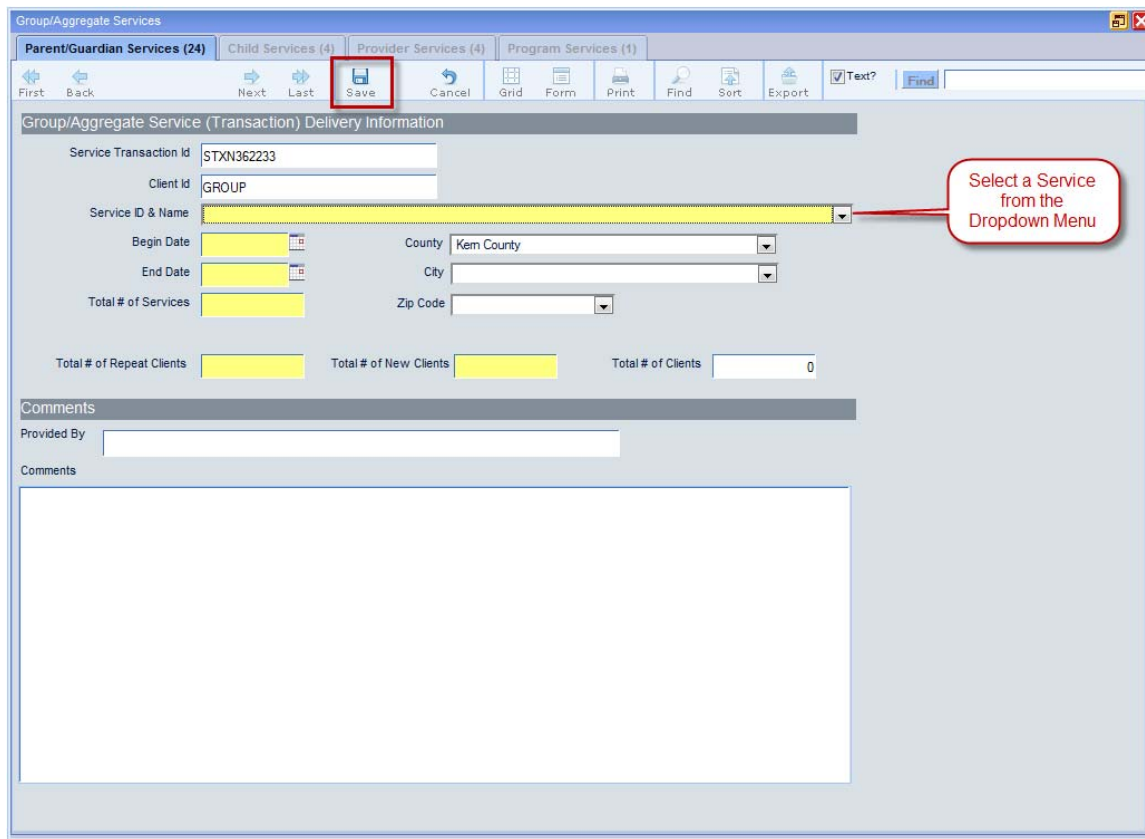
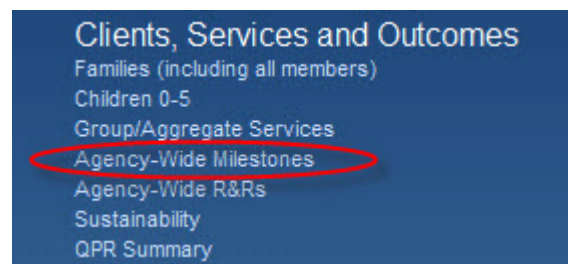


Figure 25: Update Aggregate Service Data and Click Save

AGENCY-WIDE MILESTONES MODULE

From the main GEMS Portal, under the *Clients, Services, and Outcomes* module header, find and click menu item displayed below.



This module allows you view your *Agency-Wide Milestones* in an interactive and organized format. Each individual milestone appears in bold followed by the various programs and services that are working to accomplish that milestone.

To edit an existing service or program that is attached to a specific milestone, first locate the milestone. Then locate the particular service or program attached to this milestone that you would like to edit. Highlight the desired service or program by clicking on the dark blue “Instance ID” number located on the left side of the window. Once the service or program is highlighted, click “Edit” in the top GEMS Toolbar.

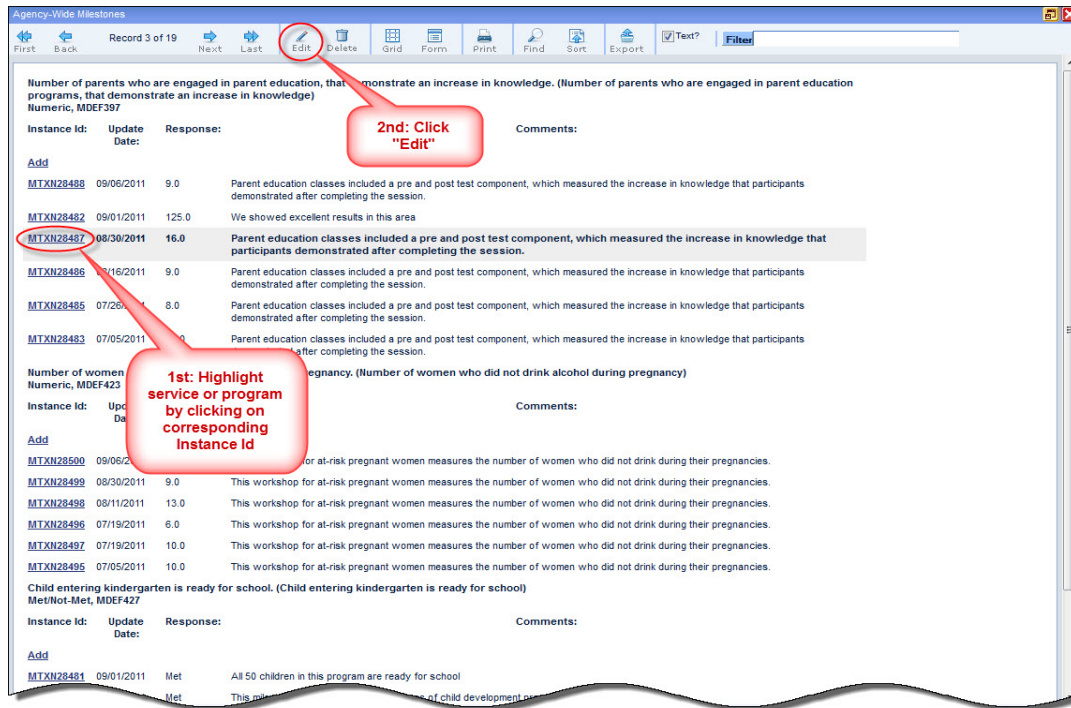


Figure 26: Select the Service or Program and Click Edit

Make the necessary modifications and click “Save” in the top GEMS Toolbar.

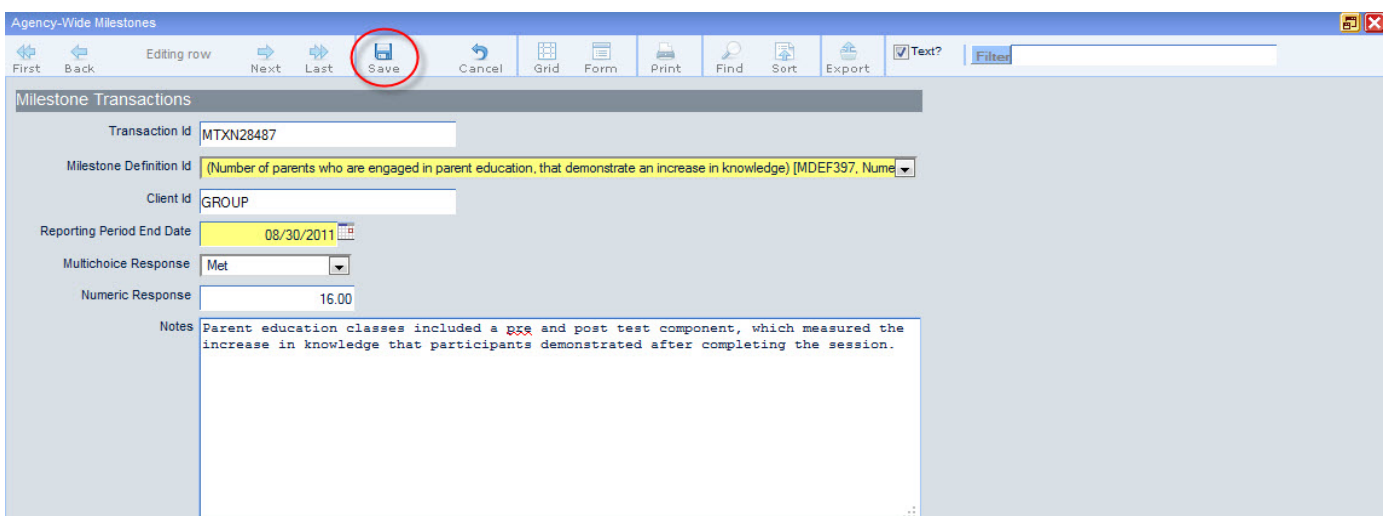
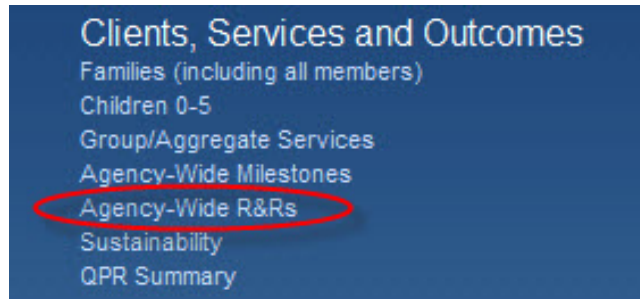


Figure 27: Once Modifications Have Been Made, Click Save

AGENCY-WIDE R&RS MODULE

The *Agency-Wide R&Rs* module provides you with a series of surveys that will be conducted by or on behalf of the client. To access the *Agency-Wide R&Rs* module, simply click on the menu item as seen below.



Once you have selected *Agency-Wide R&Rs*, you will be directed to the screen below. The drop-down menu featured below allows the user to select the appropriate survey from the list. Once you have chosen a survey, the applicable questions will appear. After checking the appropriate checkboxes, you can click "Check" to verify that you have completed the survey properly. To save the survey, simply click "Save."

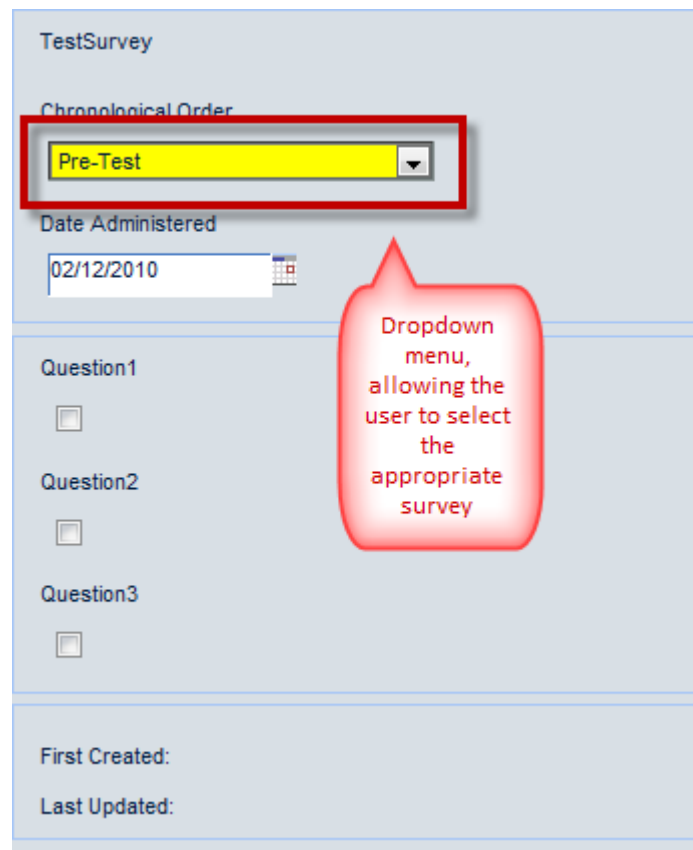
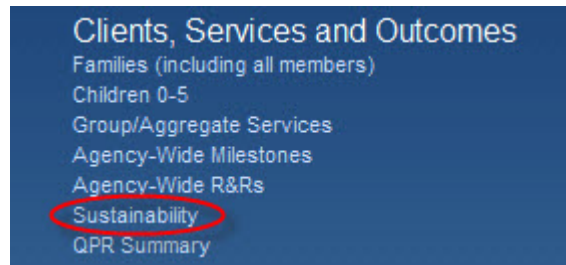


Figure 28: Choose Survey from Drop Down Menu and Complete. Click Save When Complete.

SUSTAINABILITY MODULE

From the main GEMS Portal, under the *Clients, Services, and Outcomes* module header, find and click on the menu item shown below.



To add a new *Sustainability Record*, click “Add” in the top GEMS Toolbar. A new window will now appear containing several informational fields. Fill in the appropriate information and click “Save” to complete the record.

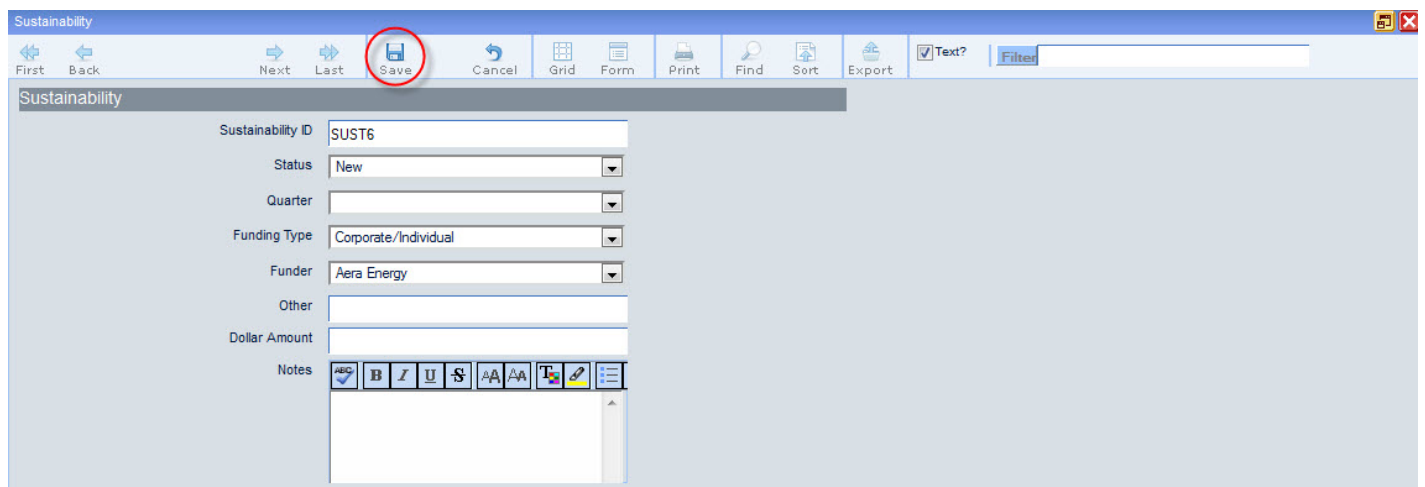

 A screenshot of the "Sustainability" form in Form View. The form contains fields for Sustainability ID (SUST6), Status (New), Quarter, Funding Type (Corporate/Individual), Funder (Aera Energy), Other, Dollar Amount, and Notes. The toolbar at the top includes buttons for First, Back, Next, Last, Save (circled in red), Cancel, Grid, Form, Print, Find, Sort, Export, and a Filter button.

Figure 29: Once Information Has Been Entered, Click Save

To add comments to a *Sustainability Record* in Form View, click “Add” found below the displayed record information.

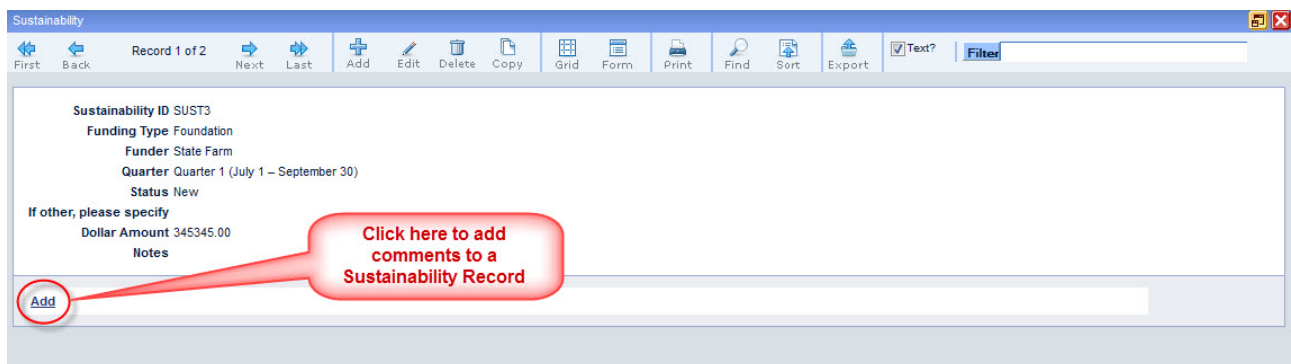
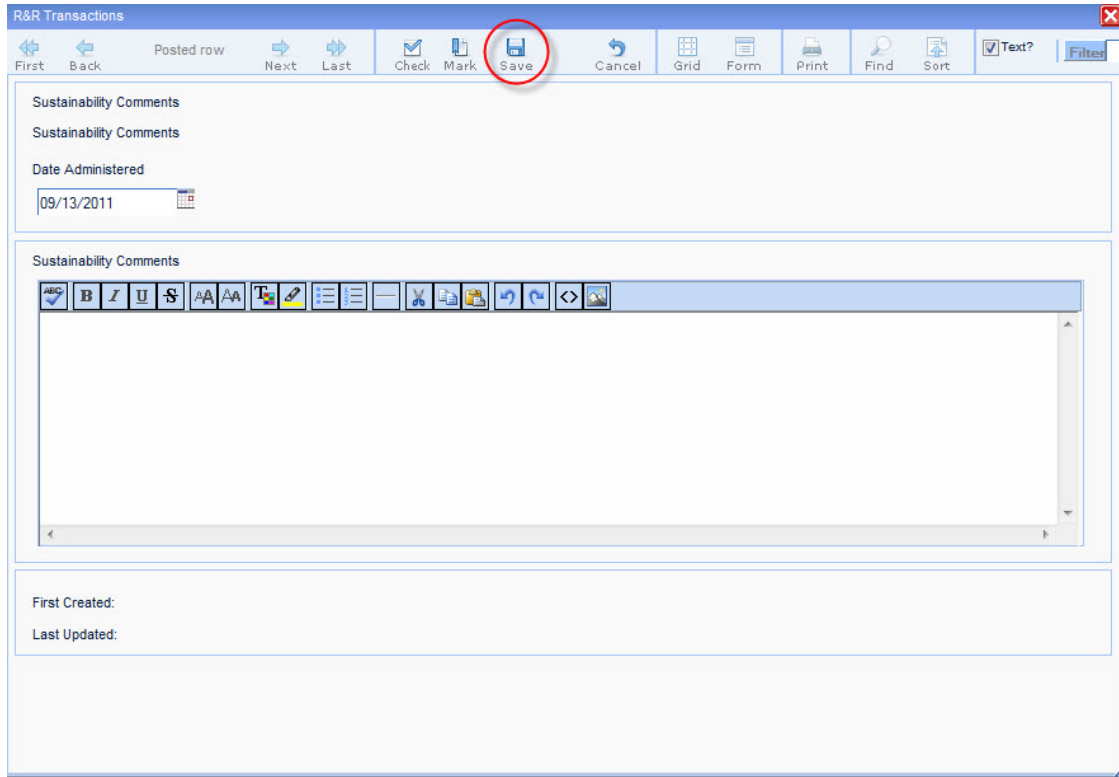

 A screenshot of the "Sustainability" form showing a record with ID SUST3. The record details include Funding Type (Foundation), Funder (State Farm), Quarter (Quarter 1 (July 1 – September 30)), Status (New), and Dollar Amount (345345.00). Below the record information, the "Add" button is circled in red. A red callout bubble points to the button with the text: "Click here to add comments to a Sustainability Record".

Figure 30: Add Comments to a Sustainability Record by Clicking Add

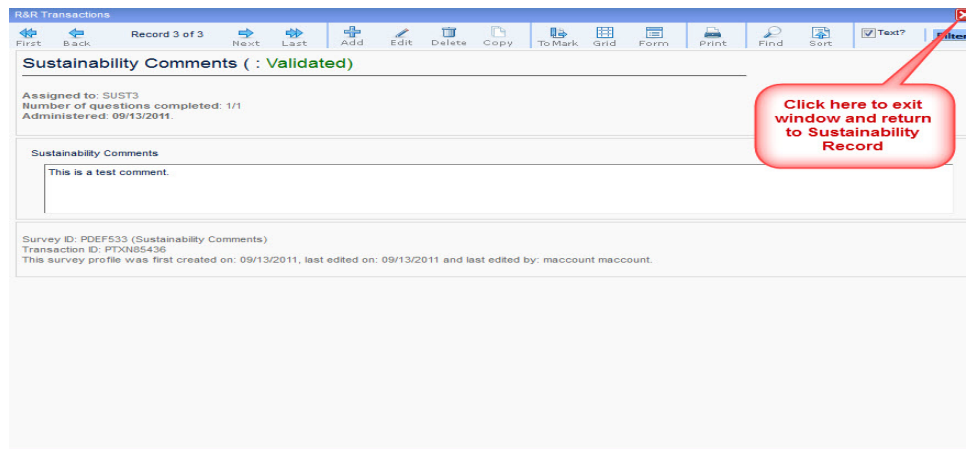
A new window will appear with a blank field for adding comments. Type your desired comment and click “Save”.



The screenshot shows the 'R&R Transactions' window. The top toolbar includes buttons for 'First', 'Back', 'Posted row', 'Next', 'Last', 'Check', 'Mark', 'Save' (circled in red), 'Cancel', 'Grid', 'Form', 'Print', 'Find', 'Sort', 'Text?', and 'Filter'. Below the toolbar, there are sections for 'Sustainability Comments', 'Date Administered' (set to 09/13/2011), and a large text area for entering comments. At the bottom, there are fields for 'First Created:' and 'Last Updated:'.

Figure 31: Click Save Once Comments Have Been Entered

Your *Sustainability Comment* will now appear in a new window with the title *R&R Transactions* at the top. If the *Sustainability Comment* is validated (indicated by a Validated in green), then click the red “X” in the upper right to return to the *Sustainability Record* in Form View.



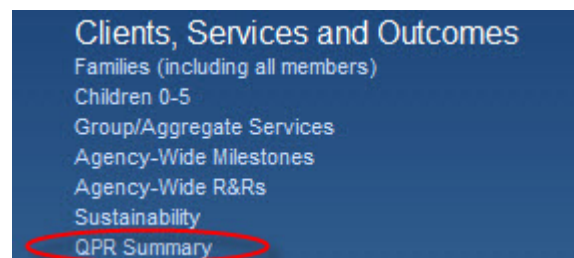
The screenshot shows the 'R&R Transactions' window after a comment has been validated. The title bar says 'Record 3 of 3'. The 'Sustainability Comments' section shows 'Validated' in green. Below this, there is a text area containing 'This is a test comment.' At the bottom, there is a red 'X' button in the upper right corner. A red callout box points to the 'X' button with the text: 'Click here to exit window and return to Sustainability Record'.

Figure 32: Once Sustainability Comment Has Been Validated, Click Red X to Return to Sustainability Record

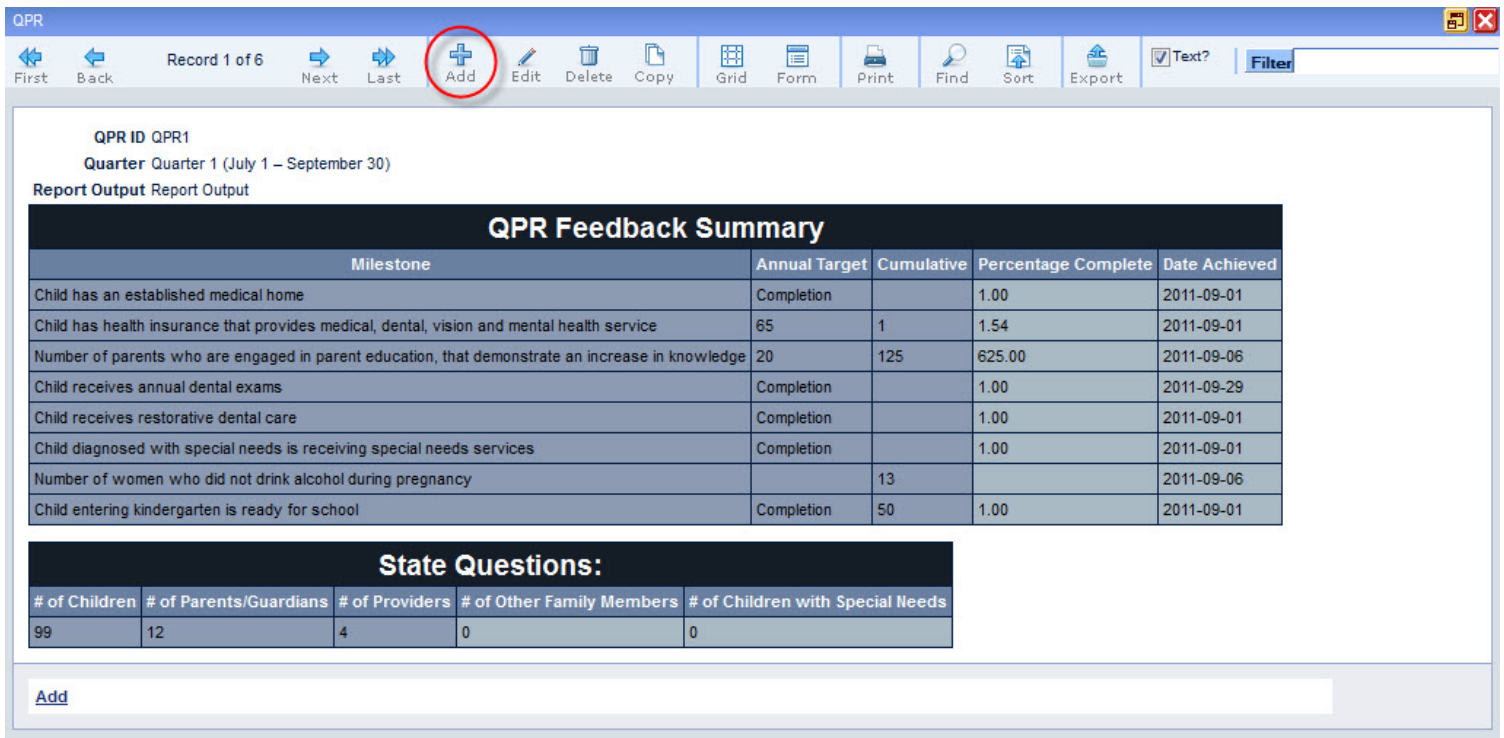
QPR SUMMARY MODULE

This module allows you to view and add *Quarterly Progress Report Summaries*.

From the main GEMS Portal, find and click on the menu item shown below.



You should be able to view existing *QPR Reports* in an organized, user friendly format.



The screenshot shows the 'QPR' module interface. At the top, there is a toolbar with buttons: First, Back, Record 1 of 6, Next, Last, Add (circled in red), Edit, Delete, Copy, Grid, Form, Print, Find, Sort, Export, and a Filter button. Below the toolbar, the interface displays 'QPR ID QPR1' and 'Quarter Quarter 1 (July 1 – September 30)'. The main content area is titled 'QPR Feedback Summary' and contains a table with the following data:

Milestone	Annual Target	Cumulative	Percentage Complete	Date Achieved
Child has an established medical home	Completion		1.00	2011-09-01
Child has health insurance that provides medical, dental, vision and mental health service	65	1	1.54	2011-09-01
Number of parents who are engaged in parent education, that demonstrate an increase in knowledge	20	125	625.00	2011-09-06
Child receives annual dental exams	Completion		1.00	2011-09-29
Child receives restorative dental care	Completion		1.00	2011-09-01
Child diagnosed with special needs is receiving special needs services	Completion		1.00	2011-09-01
Number of women who did not drink alcohol during pregnancy		13		2011-09-06
Child entering kindergarten is ready for school	Completion	50	1.00	2011-09-01

Below the table, there is a section titled 'State Questions:' with a table showing the following data:

# of Children	# of Parents/Guardians	# of Providers	# of Other Family Members	# of Children with Special Needs
99	12	4	0	0

At the bottom of the interface, there is an 'Add' button.

Figure 33: Click the Add Button to Create a New QPR Summary

To add a QPR, click “Add” in the top GEMS Toolbar. A new window will now appear. Enter a *Sustainability ID*, the desired quarter you would like a report on, and the *Report Output*. Click “Save” in the GEMS Toolbar.

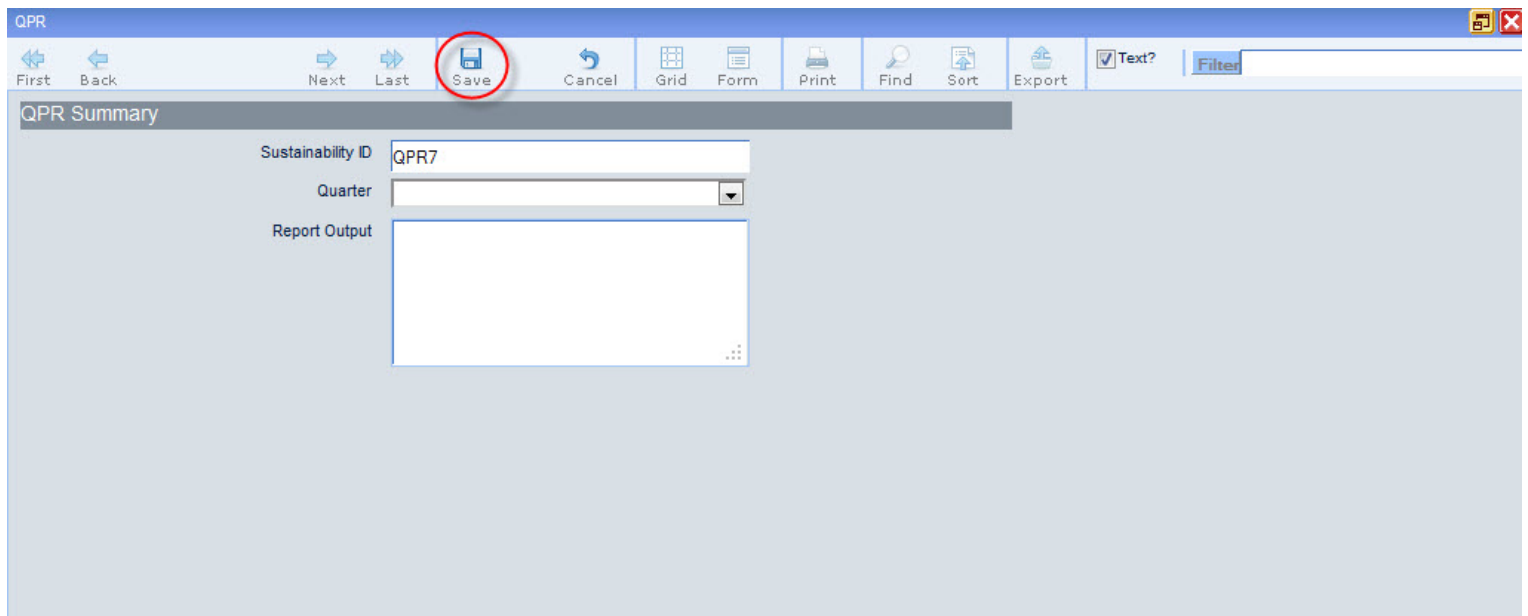
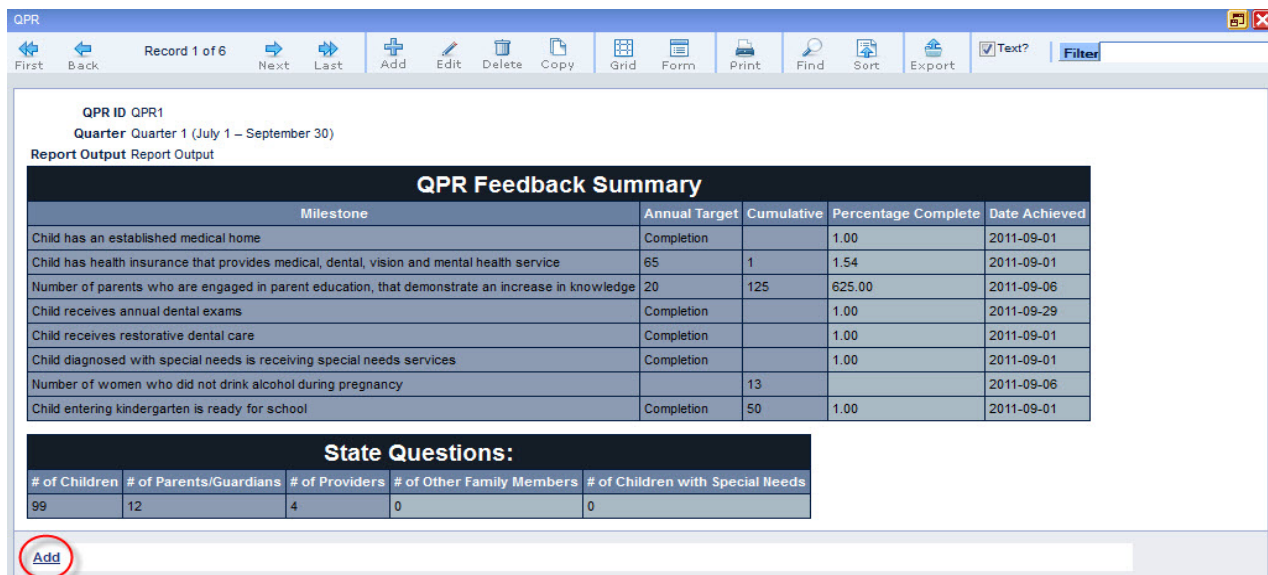


Figure 34: Once Appropriate Information is Entered, Click Save.

To add comments to a QPR, first select the QPR for which you would like to add comments. Then click “Add” located below the *QPR Table Display*.



QPR ID QPR1
Quarter Quarter 1 (July 1 – September 30)
Report Output Report Output

Milestone	Annual Target	Cumulative	Percentage Complete	Date Achieved
Child has an established medical home	Completion		1.00	2011-09-01
Child has health insurance that provides medical, dental, vision and mental health service	65	1	1.54	2011-09-01
Number of parents who are engaged in parent education, that demonstrate an increase in knowledge	20	125	625.00	2011-09-06
Child receives annual dental exams	Completion		1.00	2011-09-29
Child receives restorative dental care	Completion		1.00	2011-09-01
Child diagnosed with special needs is receiving special needs services	Completion		1.00	2011-09-01
Number of women who did not drink alcohol during pregnancy		13		2011-09-06
Child entering kindergarten is ready for school	Completion	50	1.00	2011-09-01

State Questions:

# of Children	# of Parents/Guardians	# of Providers	# of Other Family Members	# of Children with Special Needs
99	12	4	0	0

Add

Figure 35: Click Add to Enter Comments

A new window will appear with a blank space provided for commentary. Type your comments and click “Check” in the upper GEMS Toolbar.

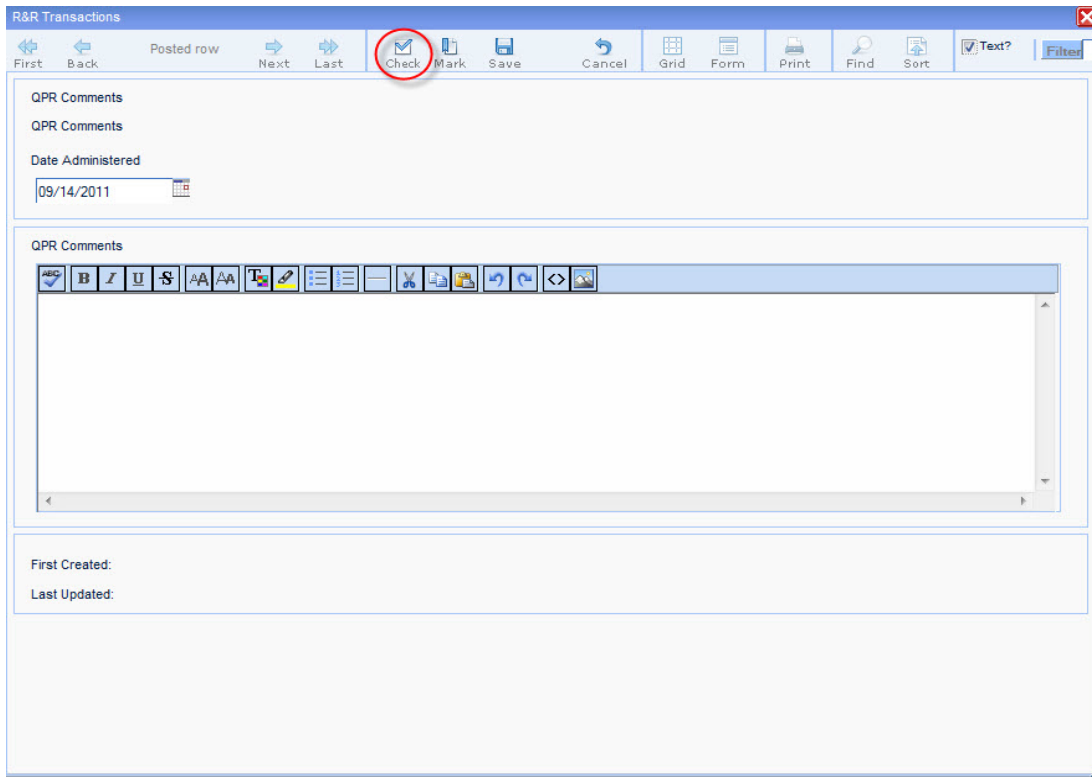
The screenshot shows the 'R&R Transactions' window. The toolbar at the top includes buttons for 'First', 'Back', 'Posted row', 'Next', 'Last', 'Check' (circled in red), 'Mark', 'Save', 'Cancel', 'Grid', 'Form', 'Print', 'Find', 'Sort', 'Text?', and 'Filter'. Below the toolbar, there are sections for 'QPR Comments', 'Date Administered' (set to 09/14/2011), and a large text area for comments with a rich text toolbar. At the bottom, there are fields for 'First Created' and 'Last Updated'.

Figure 36: Click on the Check Button to Verify Commentary

Once your response has been verified, click “Yes” to save this form now.

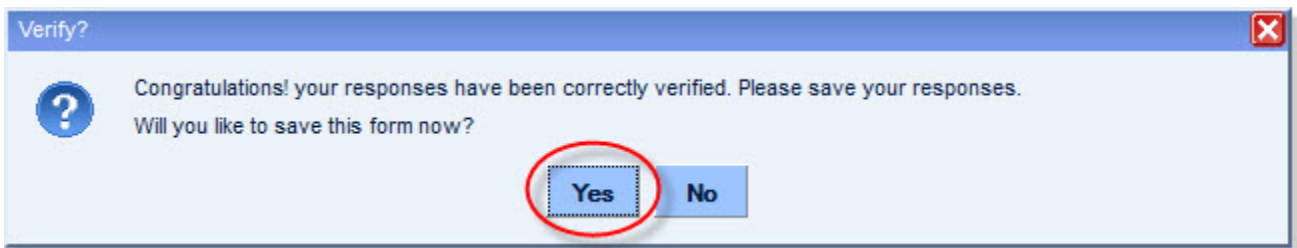
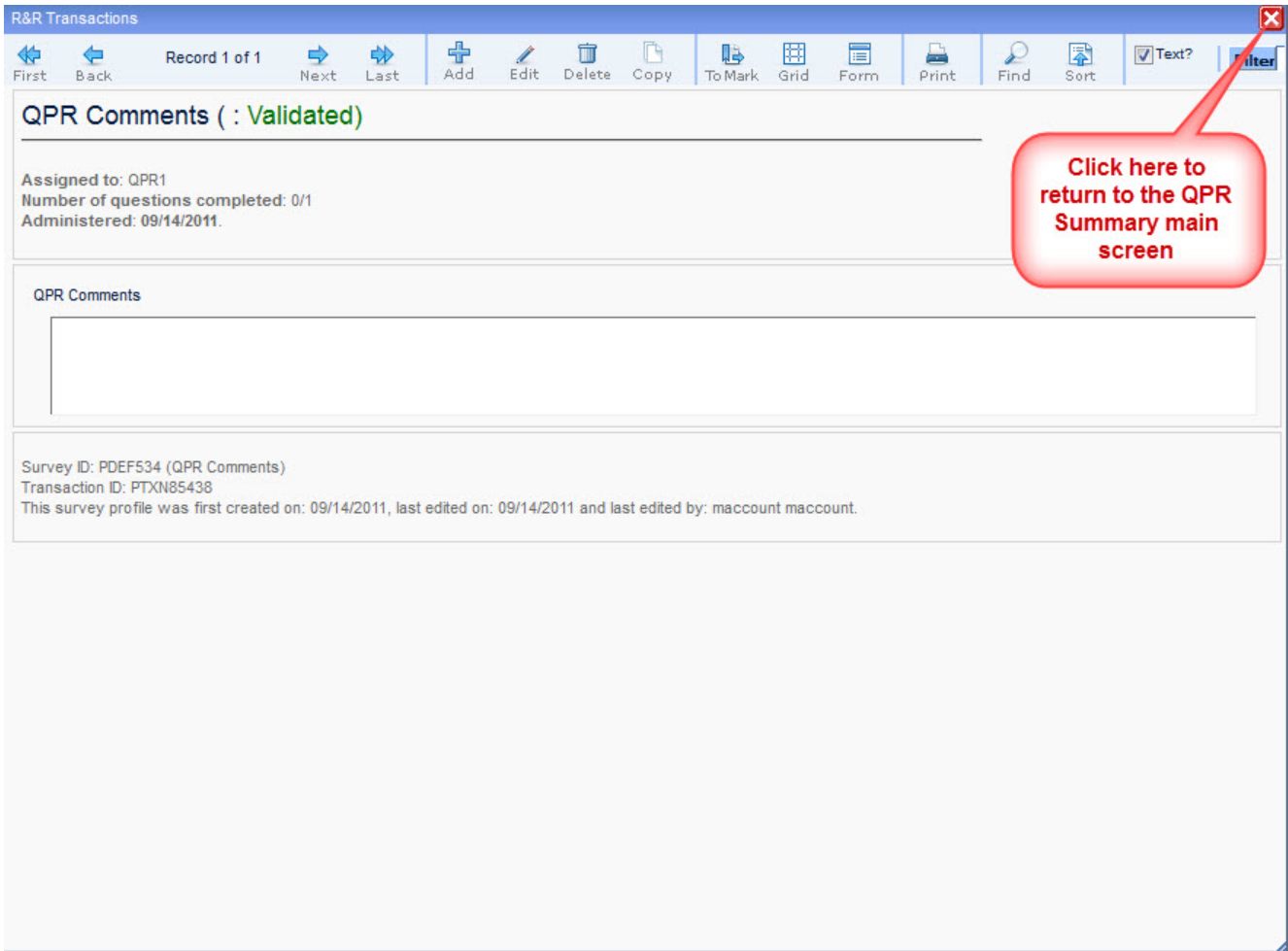
The screenshot shows a 'Verify?' dialog box with a question mark icon. The text inside reads: 'Congratulations! your responses have been correctly verified. Please save your responses. Will you like to save this form now?'. At the bottom, there are two buttons: 'Yes' (circled in red) and 'No'.

Figure 37: Click Yes to Save Commentary Form

Your validated QPR Comment will appear in a new window, press the small red “X” button in the upper right to return to the QPR main screen.



R&R Transactions

First Back Record 1 of 1 Next Last Add Edit Delete Copy To Mark Grid Form Print Find Sort ☒ Text? Filter

QPR Comments (: Validated)

Assigned to: QPR1
Number of questions completed: 0/1
Administered: 09/14/2011.

QPR Comments

Survey ID: PDEF534 (QPR Comments)
Transaction ID: PTXN85438
This survey profile was first created on: 09/14/2011, last edited on: 09/14/2011 and last edited by: maccount maccount.

Click here to return to the QPR Summary main screen

Figure 38: Once QPR Comments Have Been Validated, Click Red X to Exit

TARGET ANALYSIS & DATA COMPLETION

QUICK REVIEW OF CONTRACT SOW MODULE

To view the *Quick Review of Contract SOW* report, simply click on the menu item as seen below.



Once you have selected *Quick Review of Contract SOW* from the menu, you will be directed to the screen below. A pop-up window will appear, allowing you to access a general report based on your targets and transactions. You can view this report in a new browser window by clicking the appropriate link. Alternatively, you also have the option of exporting the report into a Word or Excel file. Simply select the preferred format from the drop-down menu in the pop-up box. After selecting the format, you can view or print your report.

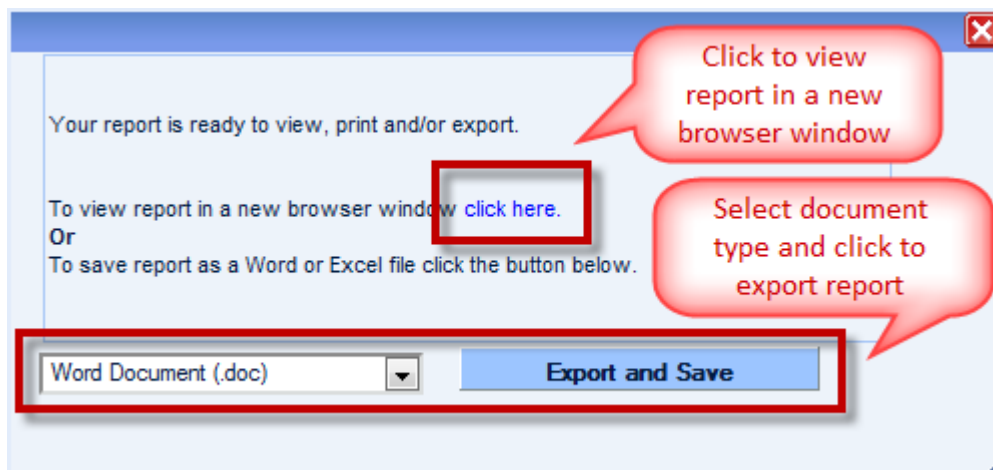


Figure 39: Select Your Preferred Method for Viewing the Report and Click Export and Save

MosaicTest123 (CONTR69)
Mosaic Network: MF&HS--Happy Toddler Child Care (TEST)
Scope of Work & Evaluation Profile

Contract Number	MosaicTest123
GEMS Contract ID	CONTR69
Contract Number	MosaicTest123
Grant Title	Mosaic Network: MF&HS--Happy Toddler Child Care (TEST)
Program Type	Strong Families
Contract Start Date	01/01/2006
Contract End Date	12/31/2009

Target (Auto-Calculated): 1.1 Prenatal women enroll in Early Head Start	
Target Definition Id	TRGT26
Short Target Title	1.1 Prenatal women enroll in Early Head Start
Target Text	1.1.1a.ii. Number of children who are referred/connected to a health insurance provider (TRGT26)
Target Type	
Client Type	Parent/Guardian
Projected Value	28
Projected Start Date	09/05/2006
Projected End Date	06/15/2009
Notes	MF&HS Happy Toddler Child Care will ensure 28 out of 30 children are enrolled in health insurance
Target (Auto-Calculated): 1.3 Prenatal women complete a prenatal exam at the local health clinic or at the Sub-Regional clinic	
Target Definition Id	TRGT28
Short Target Title	1.3 Prenatal women complete a prenatal exam at the local health clinic or at the Sub-Regional clinic
Target Text	Home Visit Note Taking
Target Type	Target Question Based
Client Type	Parent/Guardian
Projected Value	14
Projected Start Date	06/10/2008
Projected End Date	06/11/2010
Notes	
Target (Auto-Calculated): 2.1 Children enroll in Early Head Start and receive home visits	
Target Definition Id	TRGT30
Short Target Title	2.1 Children enroll in Early Head Start and receive home visits
Target Text	1.1.3a. # of parents with children 0-5 will report the use of a regular primary care provider/medical home (TRGT30)
Target Type	
Client Type	Parent/Guardian

Figure 40: Sample Quick Review of Contract SOW Report

COMPREHENSIVE TARGET REPORT MODULE

The *Comprehensive Target Report* provides you with a detailed report on your targets, services and transactions. To access the *Comprehensive Target Report*, simply click on the menu link as seen below.



Once you have selected *Comprehensive Target Report* from the menu, you will be directed to the screen below. You are then able to produce a report based on the specific information that you would like to view. The *Comprehensive Target Report* can be completed by following the three simple steps outlined in the pop-up window below. To initiate the report, simply click "Next", or "Cancel" if the report has been requested in error.

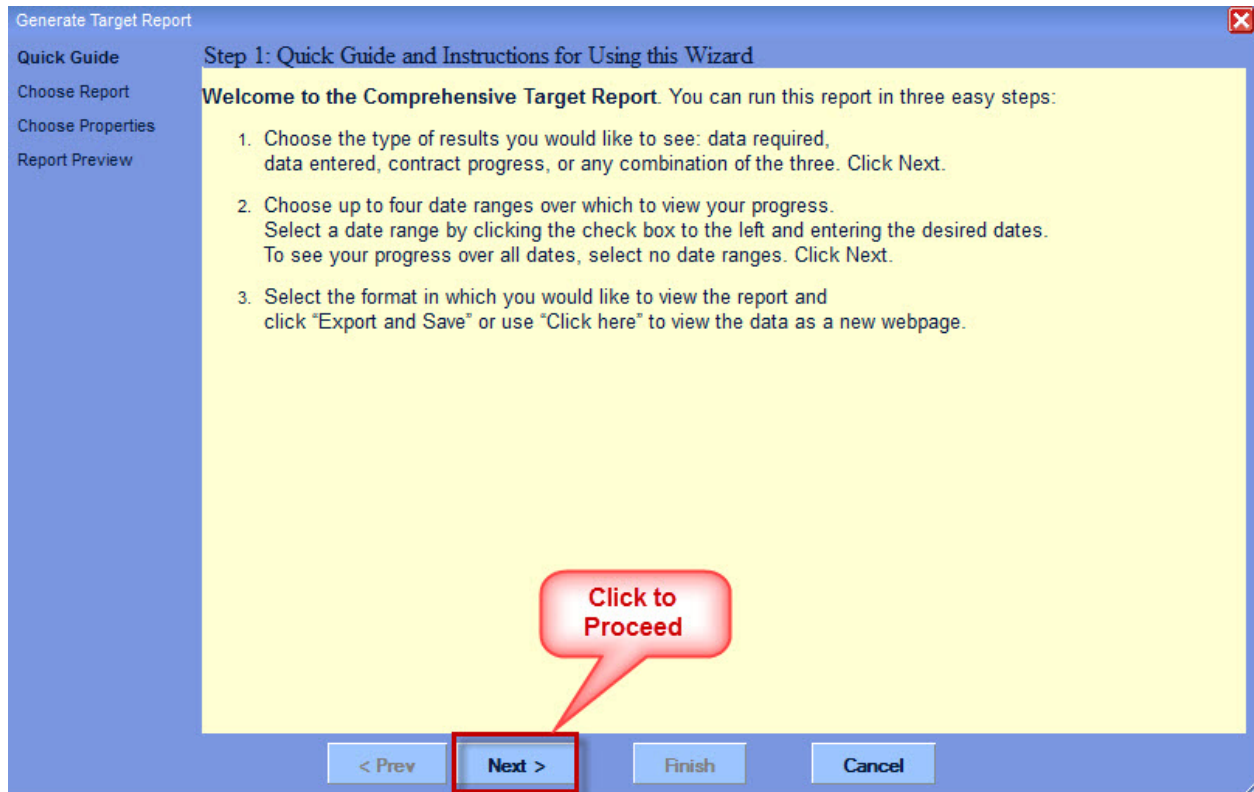
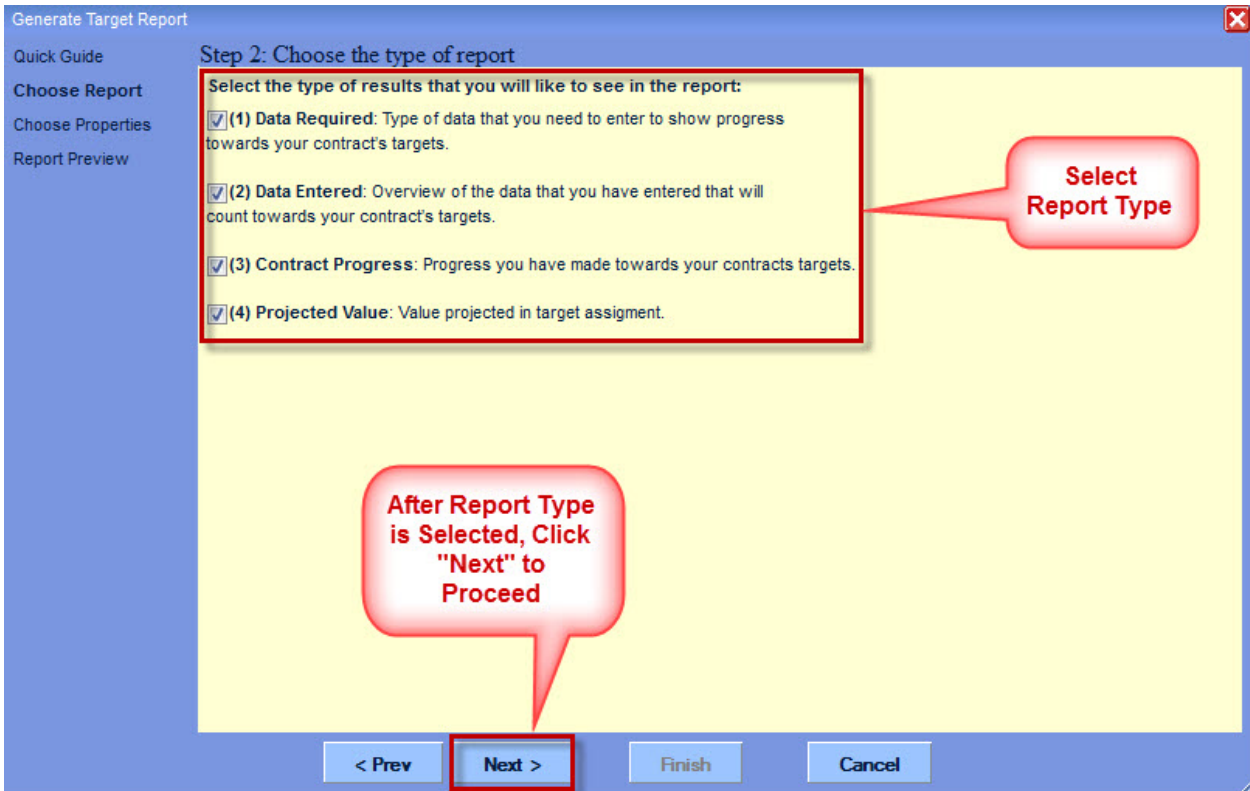


Figure 41: Follow Report Wizard Steps to Generate Your Comprehensive Target Report

After you have selected "Next," you will be directed to the next screen, which allows you to select your desired criteria from the three check boxes available; *Data Required*, *Data Entered* and *Contract Progress*. Once you have selected the data you would like included in the report, click "Next" to progress to the next screen.



Generate Target Report

Quick Guide

Choose Report

Choose Properties

Report Preview

Step 2: Choose the type of report

Select the type of results that you will like to see in the report:

- ☒ (1) **Data Required:** Type of data that you need to enter to show progress towards your contract's targets.
- ☒ (2) **Data Entered:** Overview of the data that you have entered that will count towards your contract's targets.
- ☒ (3) **Contract Progress:** Progress you have made towards your contracts targets.
- ☒ (4) **Projected Value:** Value projected in target assignment.

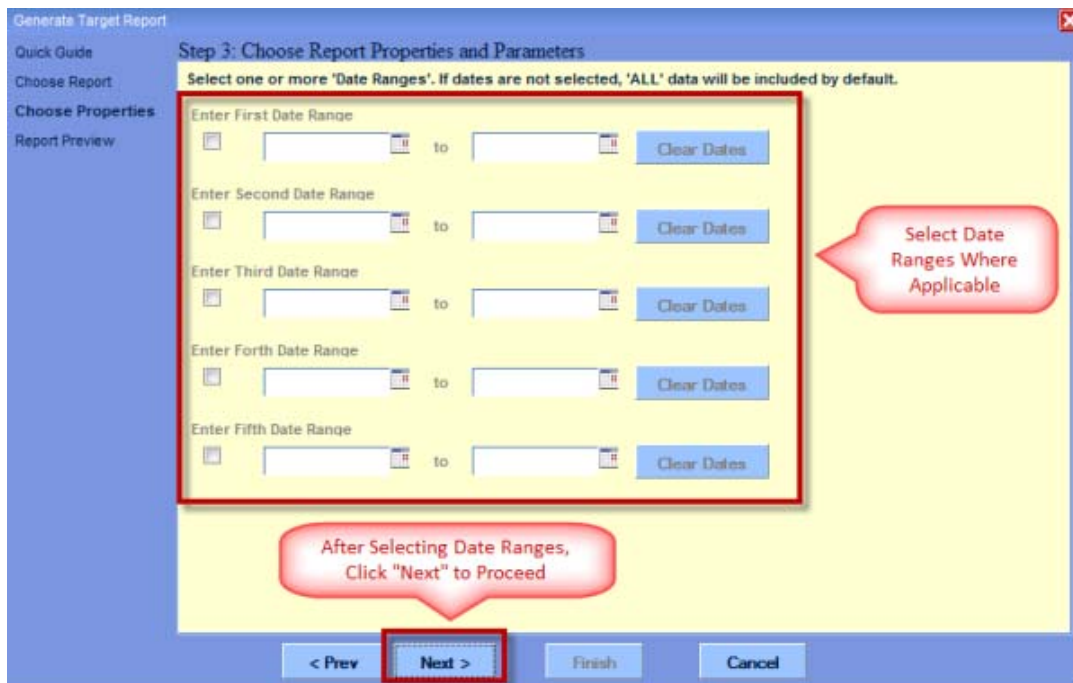
Select Report Type

After Report Type is Selected, Click "Next" to Proceed

< Prev **Next >** Finish Cancel

Figure 42: Select the Type of Report and Click Next to Proceed

The next screen that appears will allow you to specify dates. GEMS allows you to select a variety of dates or view reports without date restrictions. Once you have selected the appropriate date range, simply click "Next."



Generate Target Report

Quick Guide

Choose Report

Choose Properties

Report Preview

Step 3: Choose Report Properties and Parameters

Select one or more "Date Ranges". If dates are not selected, "ALL" data will be included by default.

Enter First Date Range

☐ [] to [] Clear Dates

Enter Second Date Range

☐ [] to [] Clear Dates

Enter Third Date Range

☐ [] to [] Clear Dates

Enter Forth Date Range

☐ [] to [] Clear Dates

Enter Fifth Date Range

☐ [] to [] Clear Dates

Select Date Ranges Where Applicable

After Selecting Date Ranges, Click "Next" to Proceed

< Prev **Next >** Finish Cancel

Figure 43: Choose Desired Date Range and Click Next to Continue

The final screen that appears provides you with the option of viewing your report in a new browser window by clicking the appropriate link. Alternatively, you also have the option of exporting the report into a Word or Excel file. Simply select the preferred format from the drop-down menu in the pop-up box.

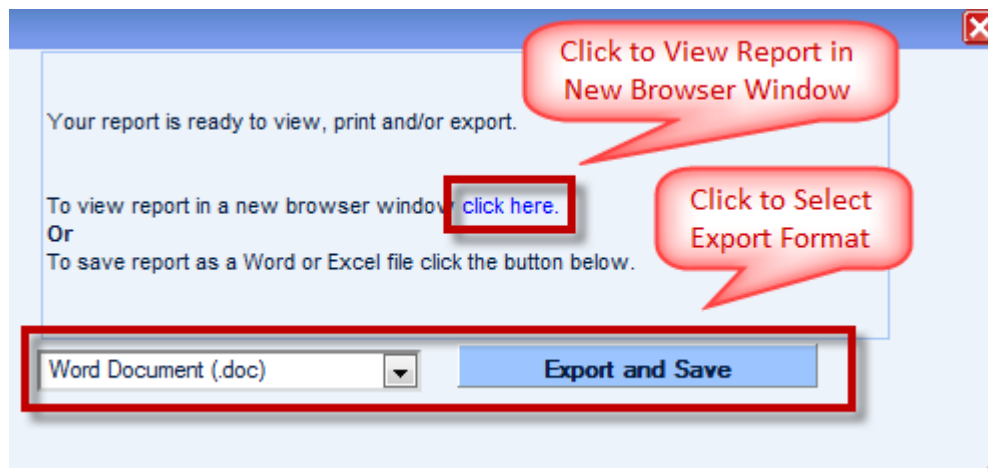


Figure 44: Select Desired Viewing and Export Method

The final report will provide you with specific details on your milestone progress.

Target Report									
This report provides details for targets assigned to the selected contract(s) and related information for all data in the system.									
MosaicTest123 (CONTR69): Mosaic Network: MF&HS - Happy Toddler Child Care (TEST)									
S. No.	Target Title	Target Text (from SOW)	Data Source (All Data)	Data Entered (All Data)	Projected Value (All Data)	Actual (All Data)	Percent (All Data)	Met? (All Data)	Progress
1	1.1 Prenatal women enroll in Early Head Start (TRGT26)	1.1 Staff conduct ongoing recruitment activities for prenatal women.	Measured as count of unique clients for the following Target (Question): • MDEF-TRGT26 (Active): Referred for Health Insurance (Child) [Participant: Agency-Wide] [Type: Numeric]	# Target (Question) Records Entered: • Family (MDEF-TRGT26): 7	28	2	7.14%	Not Met	
2	1.3 Prenatal women complete a prenatal exam at the local health clinic or at the Sub-Regional clinic (TRGT28)	1.3 Home Visitor completes at least three prenatal home visits with enrollee prior to admittance to the pre-maternal home. Home Visitor obtains a Health History and YKHC Authorization during enrollment or during the first initial home	No services associated with this target.	No service data entered for this target.	14	0	0.00%	Not Met	

Figure 45: Sample Comprehensive Target Report

DATA ANALYSIS AND REPORTING

QUARTERLY PROGRESS REPORT MODULE

From the main GEMS Portal, under the *Data Analysis and Reporting* module header, find and click on the menu item shown below.



A small window will appear prompting you to either *Load an Existing Report* or *Generate a New Report*.



Figure 46: Quarterly Progress Report Initial Screen

To *Load an Existing Report*, click “Load Existing Report”. You are now presented with *Current Reports* and *Archived Reports* in a Grid View. Select a report by clicking on its corresponding row, and click “OK”.

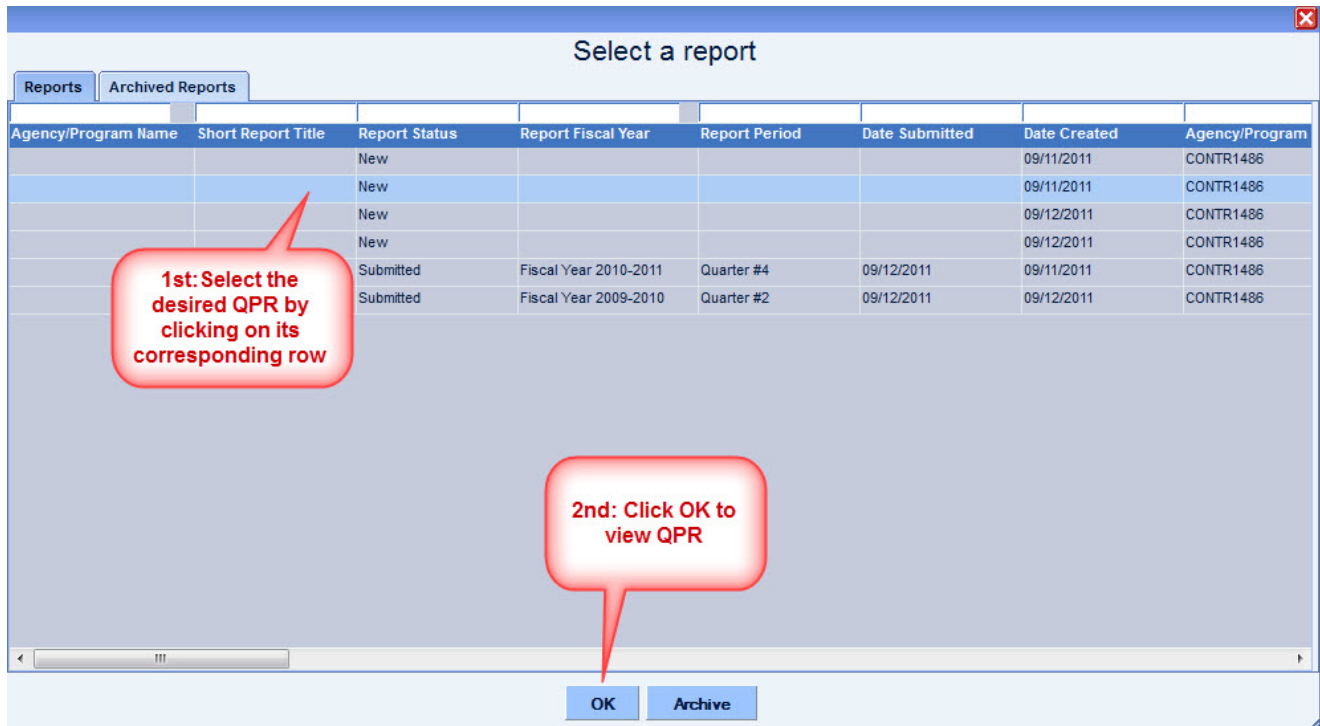
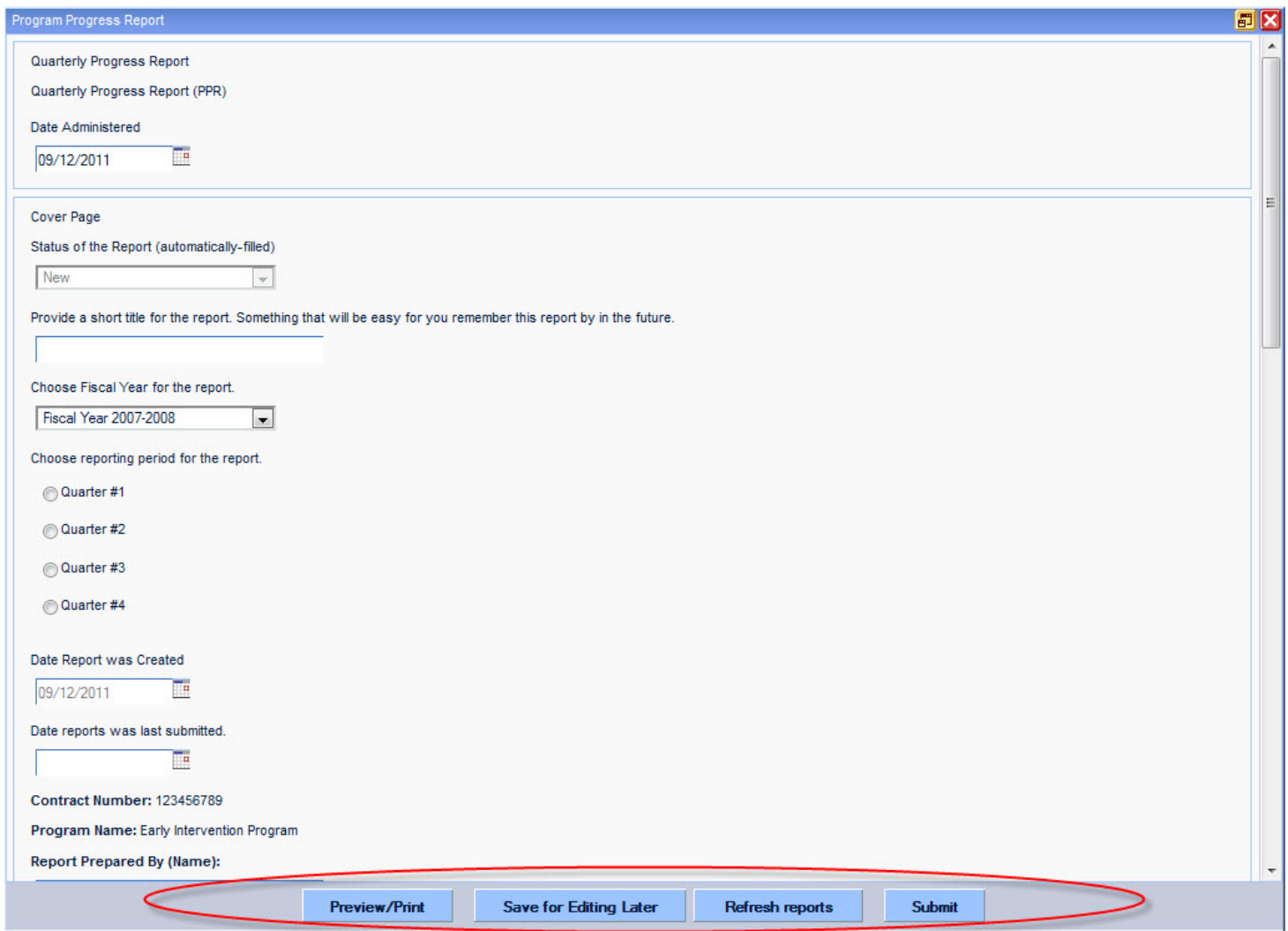


Figure 47: Select Report By Click on its Row, Then Click OK to View QPR

If the existing report has already been submitted, then you will be able to view it in a read only format. If the existing report has not been submitted, then you are able to view and edit information on the selected report. Once all the information is determined to be accurate, there are four options for continuing. You can either *Preview/Print* the QPR, *Save for Editing Later*, *Refresh Reports*, or *Submit*. *Preview/Print* will allow you to view the print version of the report and print it out. *Save for Editing Later* will simply save the data in the report for later use. *Refresh Reports* will return with QPR to its original completed state. *Submit* will allow you to submit the report; however, once the report is submitted you will not be able to modify it further.



Program Progress Report

Quarterly Progress Report

Quarterly Progress Report (PPR)

Date Administered

09/12/2011

Cover Page

Status of the Report (automatically-filled)

New

Provide a short title for the report. Something that will be easy for you remember this report by in the future.

Choose Fiscal Year for the report.

Fiscal Year 2007-2008

Choose reporting period for the report.

☐ Quarter #1

☐ Quarter #2

☐ Quarter #3

☐ Quarter #4

Date Report was Created

09/12/2011

Date reports was last submitted.

Contract Number: 123456789

Program Name: Early Intervention Program

Report Prepared By (Name):

Preview/Print Save for Editing Later Refresh reports Submit

Figure 48: Decide Between the Following: Preview/Print, Save for Editing Later, Refresh Reports, or Submit.

To *Generate a New Report*, click the “Generate New Report” button.

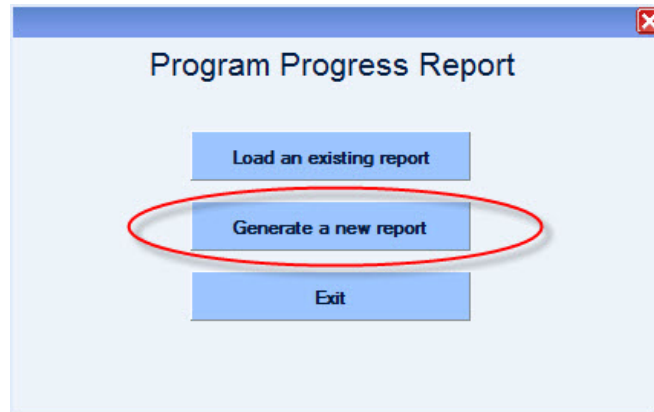


Figure 49: Generate a New Report Button

You are now presented with a QPR template that is ready to be completed. Complete the necessary parts of the QPR. When you reach the bottom of the report, you have the option of viewing the completed report before submitting. Located below the *Sustainability Updates Narrative* box, click on the blue underlined link entitled “Click Here to View Complete Report.”

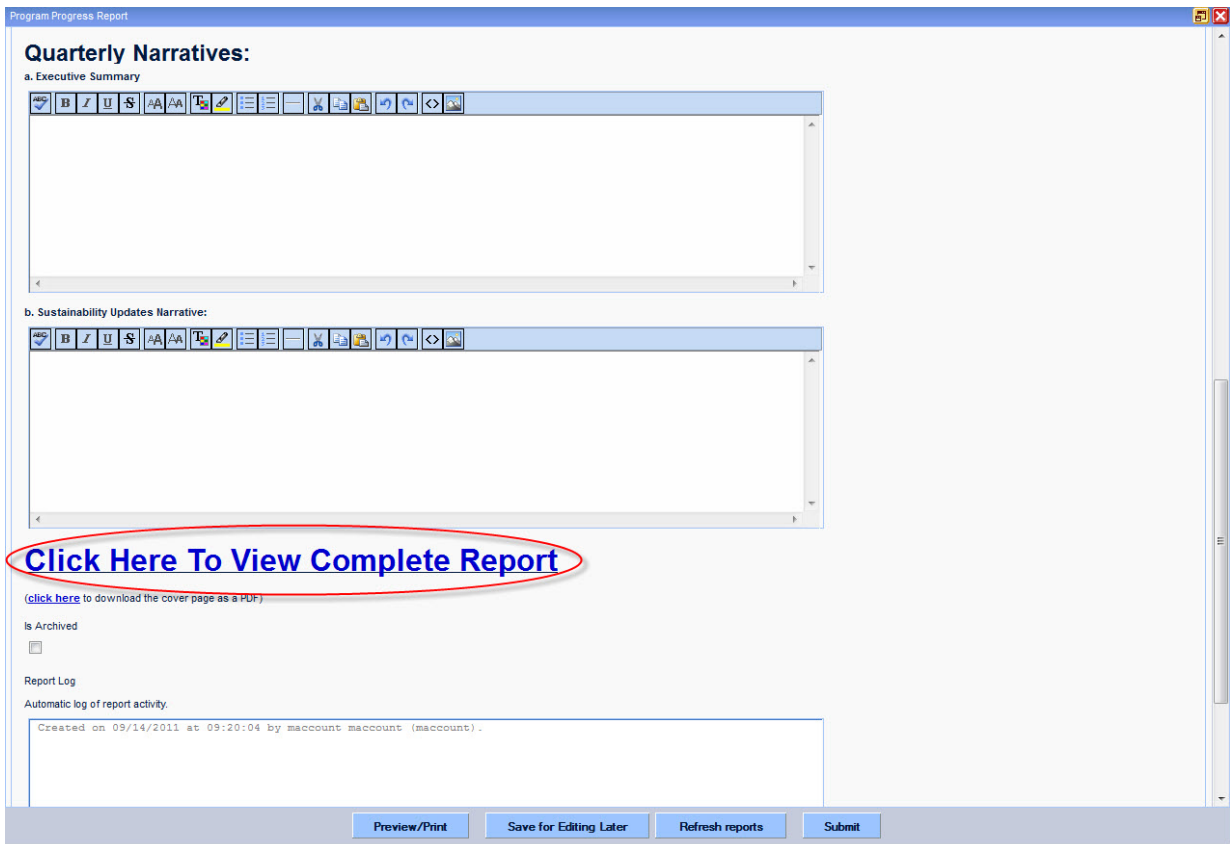


Figure 50: View Complete QPR Report by Clicking the Click Here to View Complete Report Button

The report will now appear in a separate web browser window. Once you have reviewed the complete report, you can *Preview/Print* the report, *Save for Editing Later*, *Refresh Reports*, or *Submit* the report. By clicking “Submit”, you will submit the QPR for further review.

QUICK SYSTEM-WIDE REPORTS MODULE

The *Data Analysis and Reporting* category provides you with various reports based on the data you have entered into GEMS. The first module in this category is *Quick System-Wide Reports*. To access this module, simply click on the menu item as seen below.



The *Quick System-Wide Reports* option will provide you with a fast and easy way of producing reports based on the system as a whole. When you click on the menu item, you will be directed to the screen below.

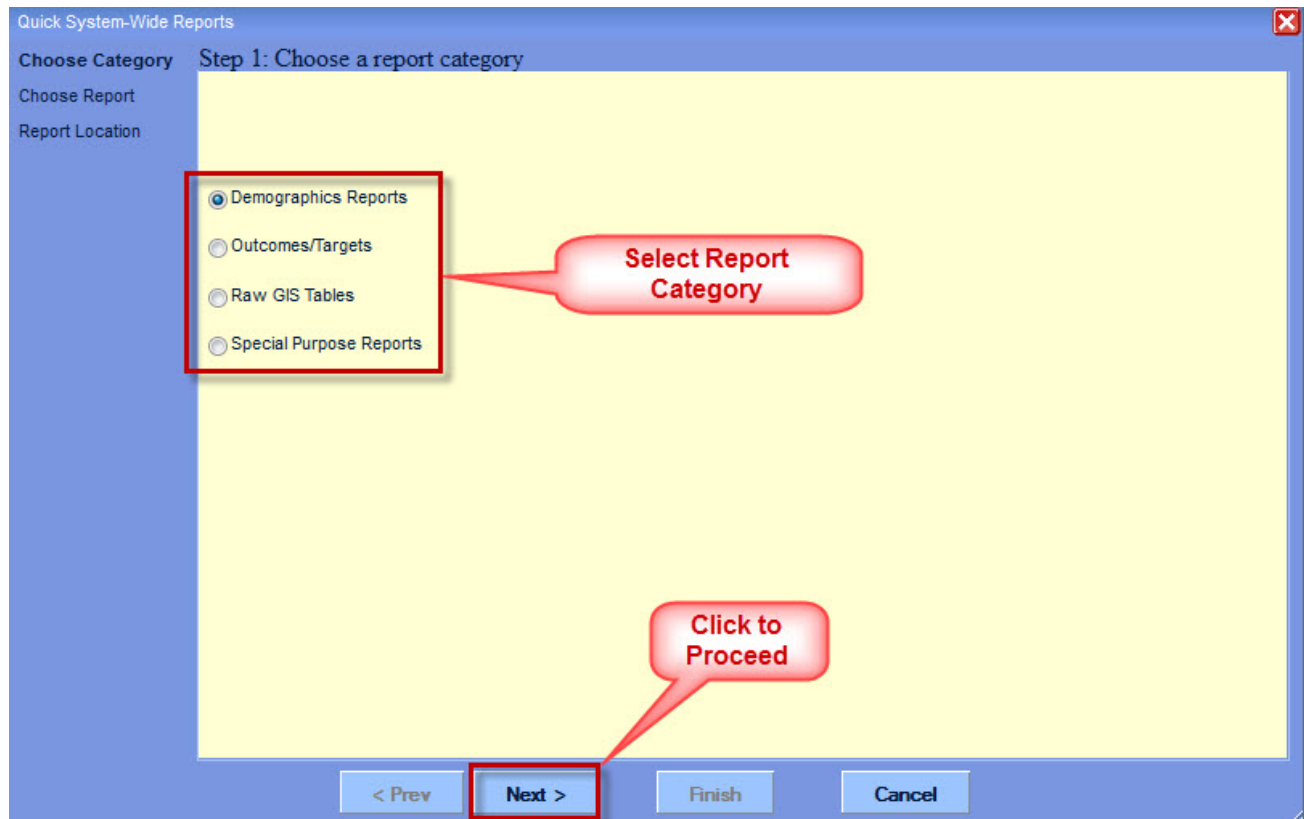


Figure 51: Choose Desired Report Category and Click Next

You will then be directed to the next screen, where you can select the report you would like to view. After clicking "Next," you will have the option of viewing the report in a new browser window, or exporting the report into a variety of programs.

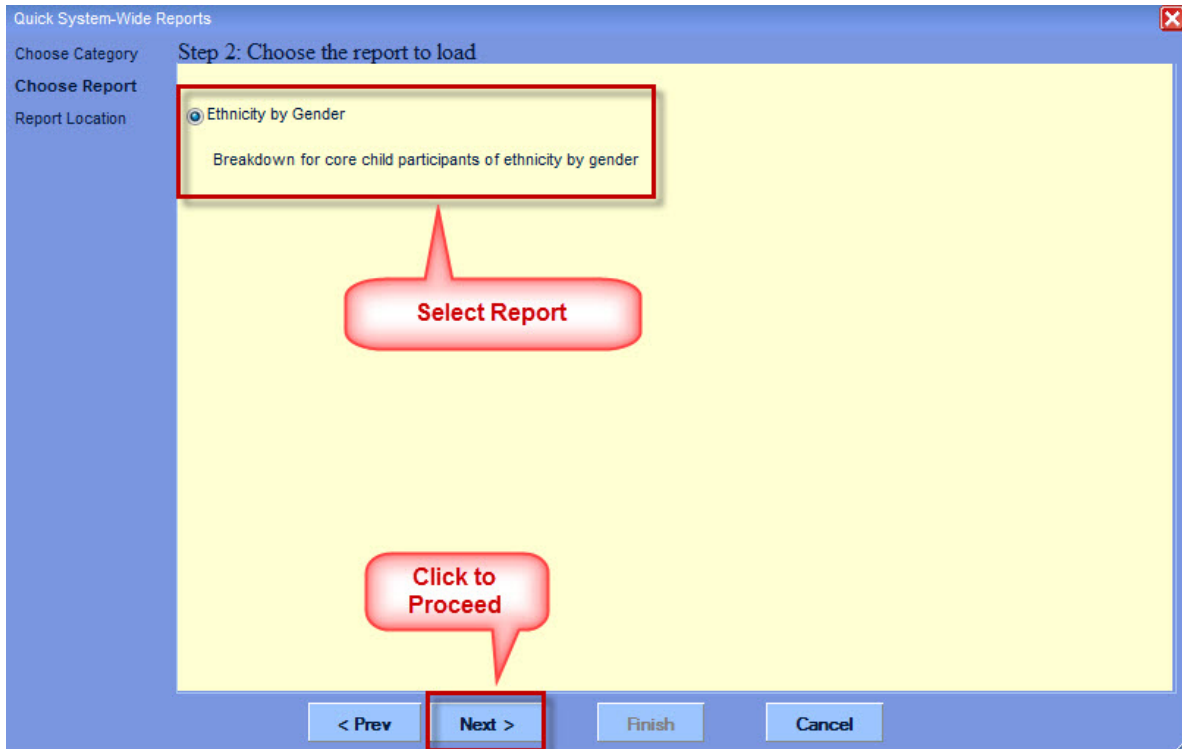


Figure 52: Choose Which Type of Report to Load And Click Next

ADVANCED REPORTS MODULE

The second reporting option in the *Data Analysis and Reporting* menu is *Advanced Reports*. To access *Advanced Reports*, simply click on the menu item as seen below.



Once you have selected *Advanced Reports* from the menu, you will be directed to the screen below. This screen is very similar to the *Quick System-Wide Reports* screen. GEMS will ask you to select the category of report you would like to view. Reports can be categorized as Demographic, GIS (geographical data) or Special Reports. This option differs from the *Quick System-Wide Reports* module in that it offers you additional reporting options. You are able to select parameters in this module as well as include graphs and

charts. By selecting the category of report and clicking "Next," you will be directed to select the options that will determine the nature of the report.

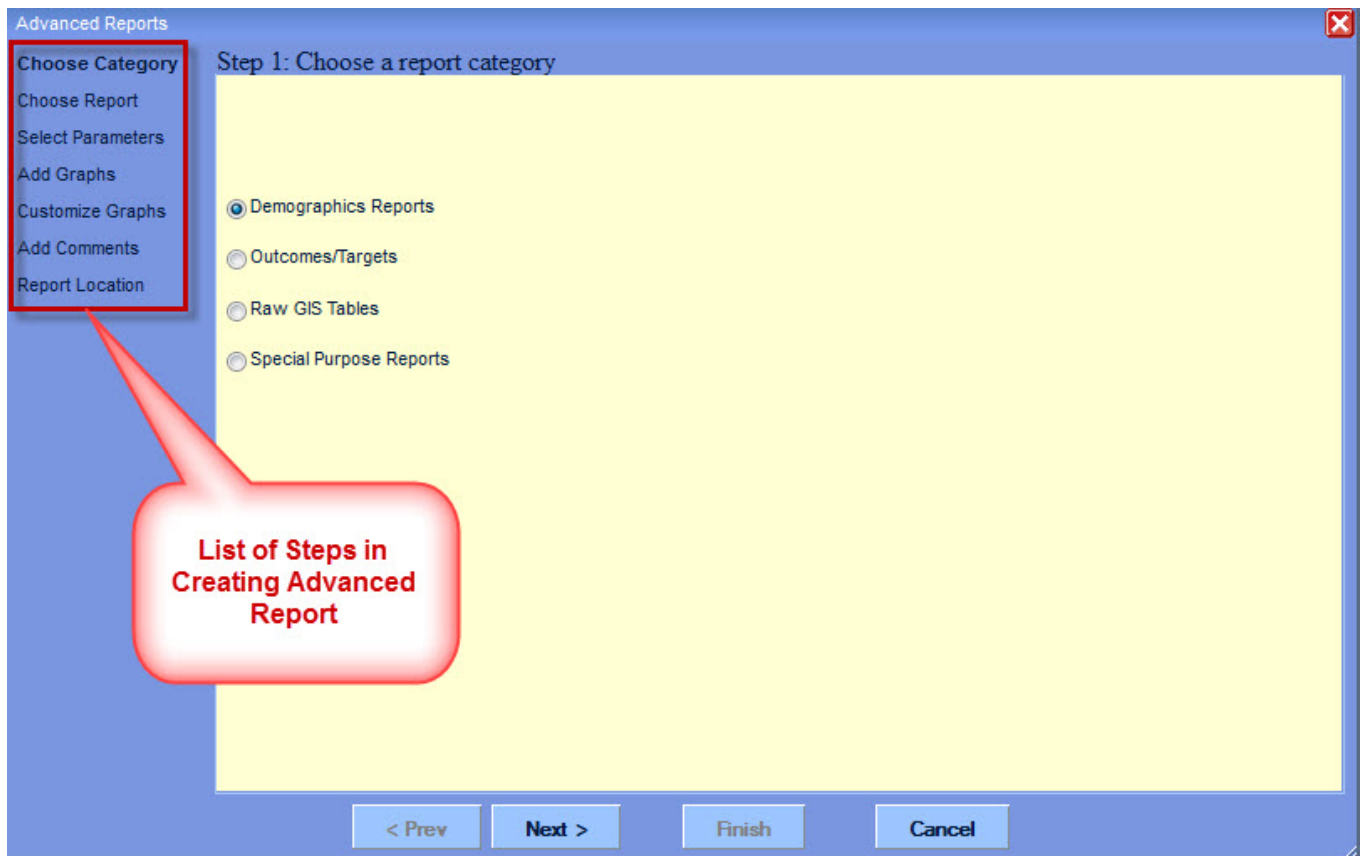


Figure 53: Follow the Steps in the Report Wizard to Complete Your Advanced Report

GIS REPORTS MODULE

The fourth type of report available in the *Data Analysis and Reporting* menu is *GIS Reports*. To access *GIS Reports*, simply click on the menu item as seen below.



Once you have selected *GIS Reports* from the menu, you will be directed to the screen below. This screen is also very similar to both the *Quick System-Wide Reports* and the *Advanced Reports* screens. The main difference in the *GIS Reports* option is that the results of the report will be in the format of a map.

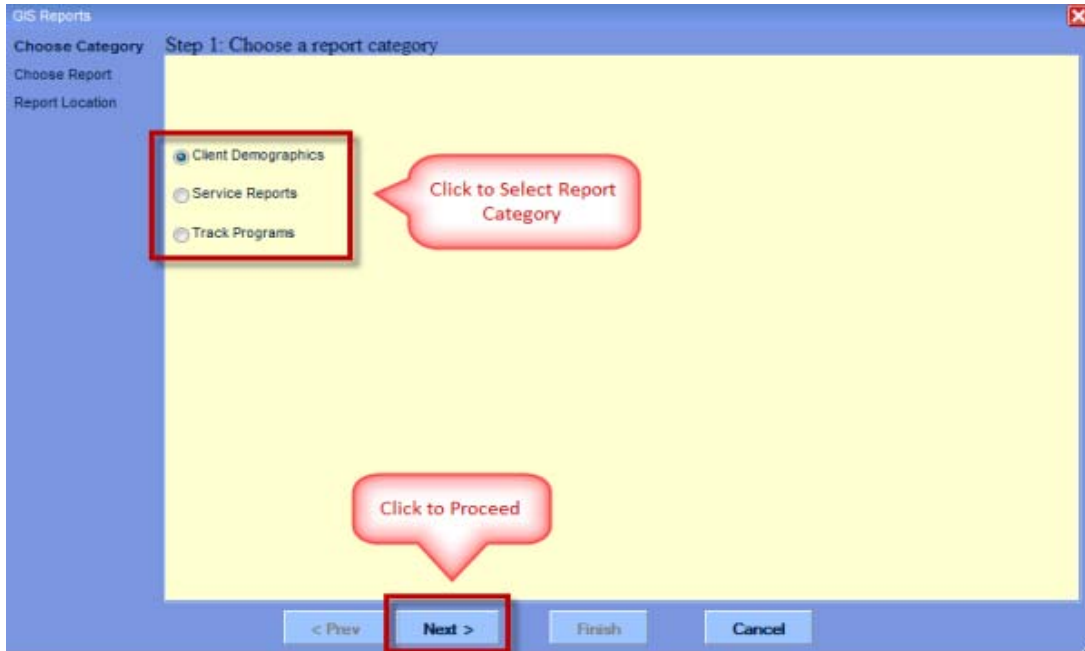


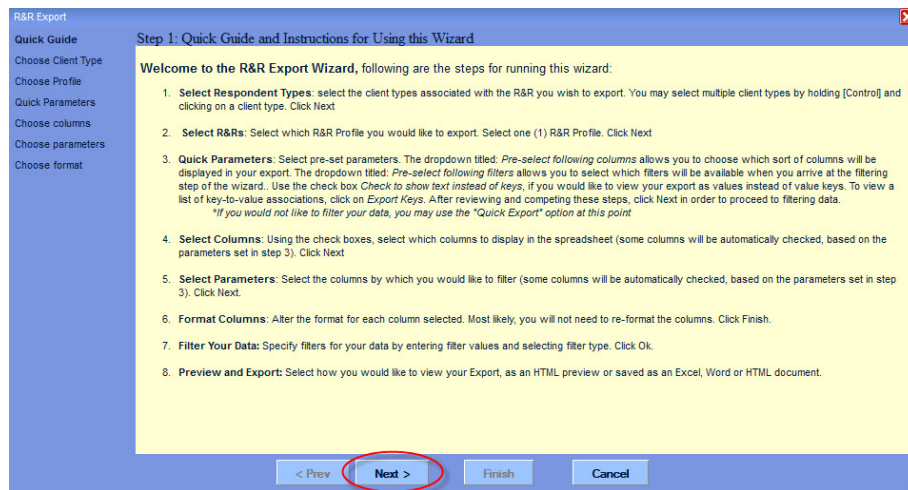
Figure 54: Follow the Steps in the Report Wizard to Complete Your GIS Report

R&R EXPORT WIZARD MODULE

To access the *R&R Export Wizard*, find and click on the menu item as shown below.



Once you have selected *R&R Export Wizard* from the menu, you will be directed to a *Report Wizard* screen as shown below. Click “Next” to proceed.



Figure

55: Click Next to Proceed With Your R&R Export

Now you will be prompted to choose a *Client Type*. Select the desired *Client Type* and click "Next" to proceed.

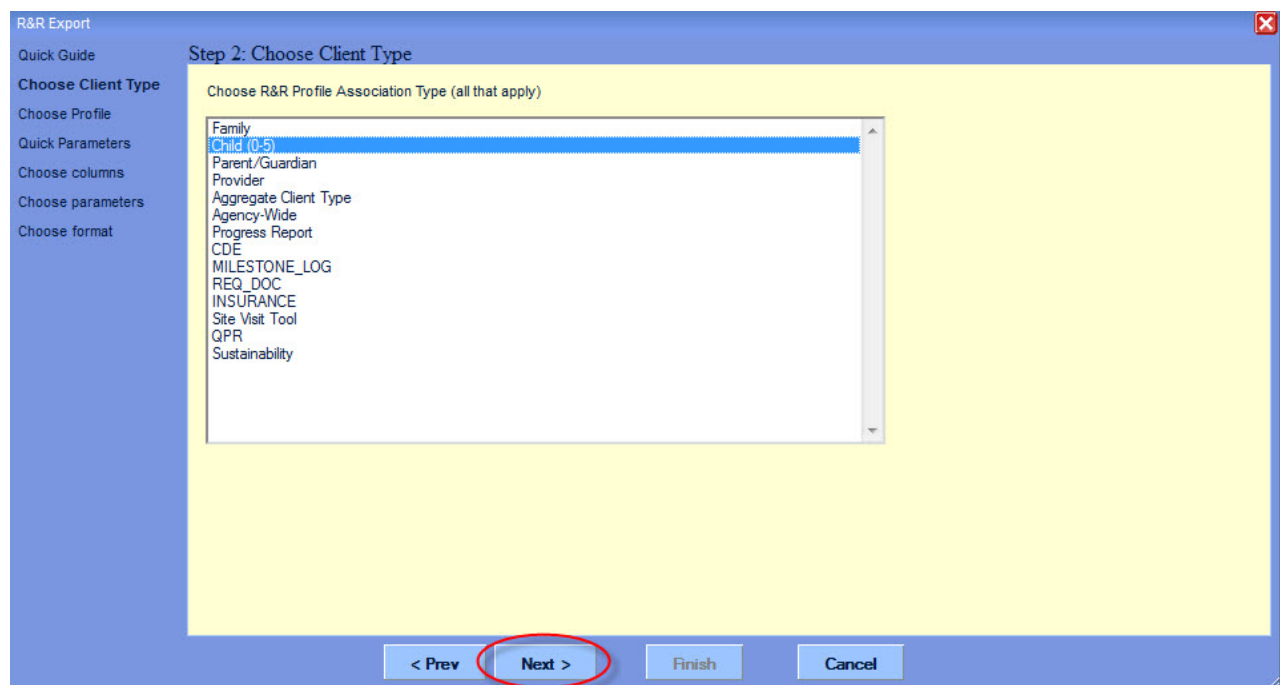


Figure 56: Choose Desired Client Type and Click Next to Continue

Next, choose a *Profile Type* and click “Next” to continue.

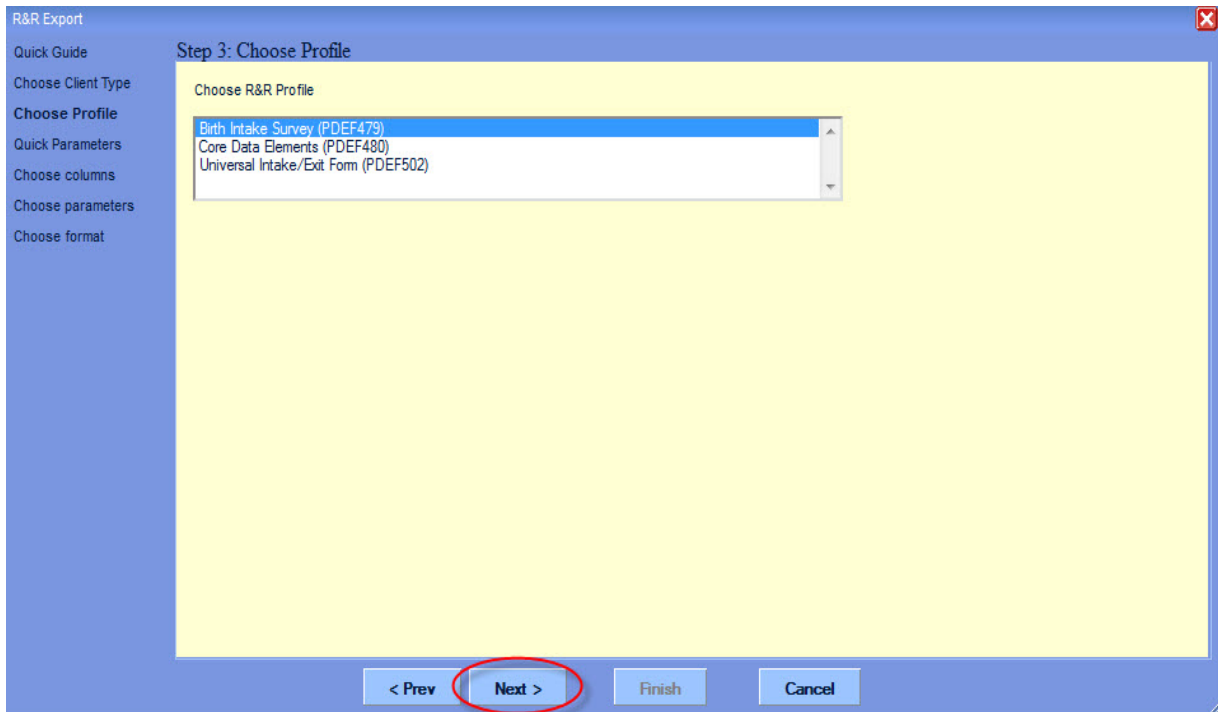


Figure 57: Choose Desired Profile Type and Click Next to Continue

The next screen allows you to choose *Quick Parameters* to specify your *R&R Export*. Choose the desired parameters and click “Next” to proceed. You can also click the yellow *Quick Export* button to view a less detailed report faster.

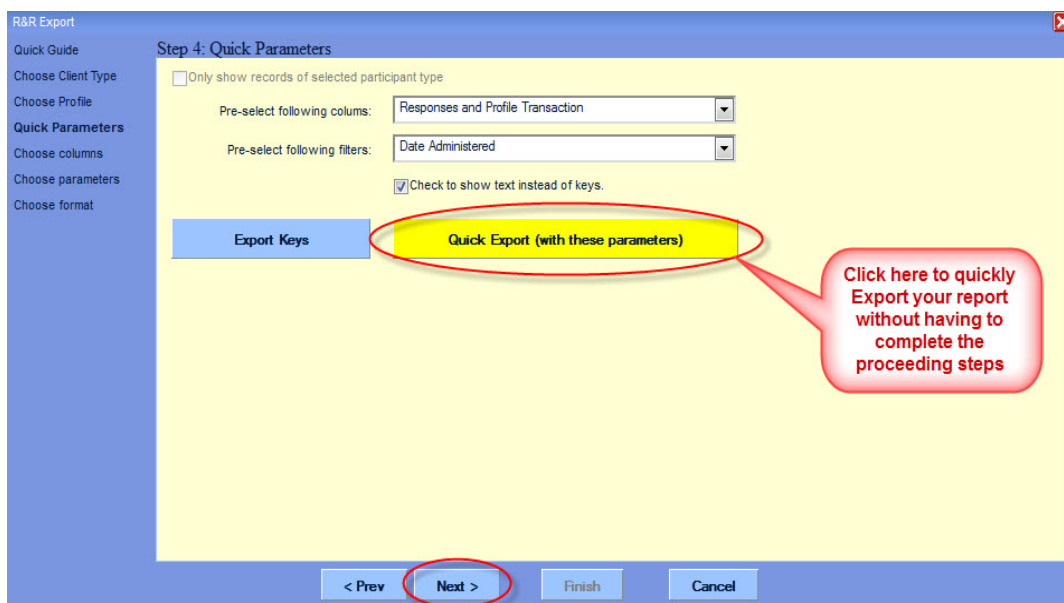


Figure 58: Choose Quick Parameters and Click Next. Click Quick Export to View a Less Detailed Report Faster

Now you are able to *Choose Columns* for your export. Check the boxes next to the desired columns and click “Next” to proceed. You can also click on the “Select All” or “Select None” to select all or none of the columns.

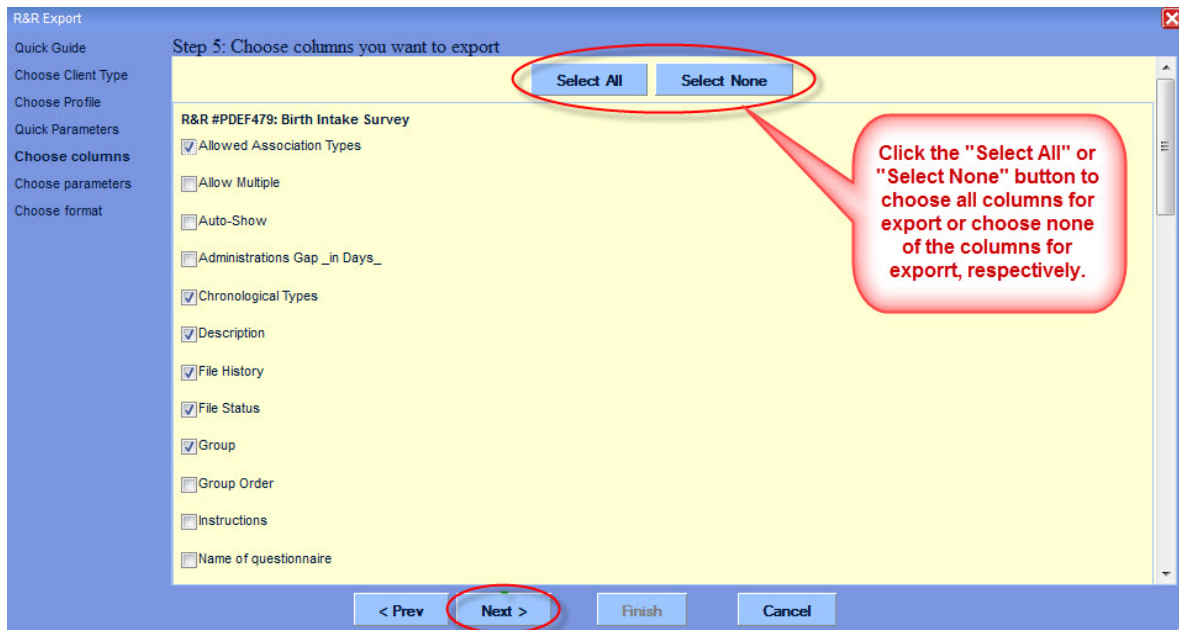
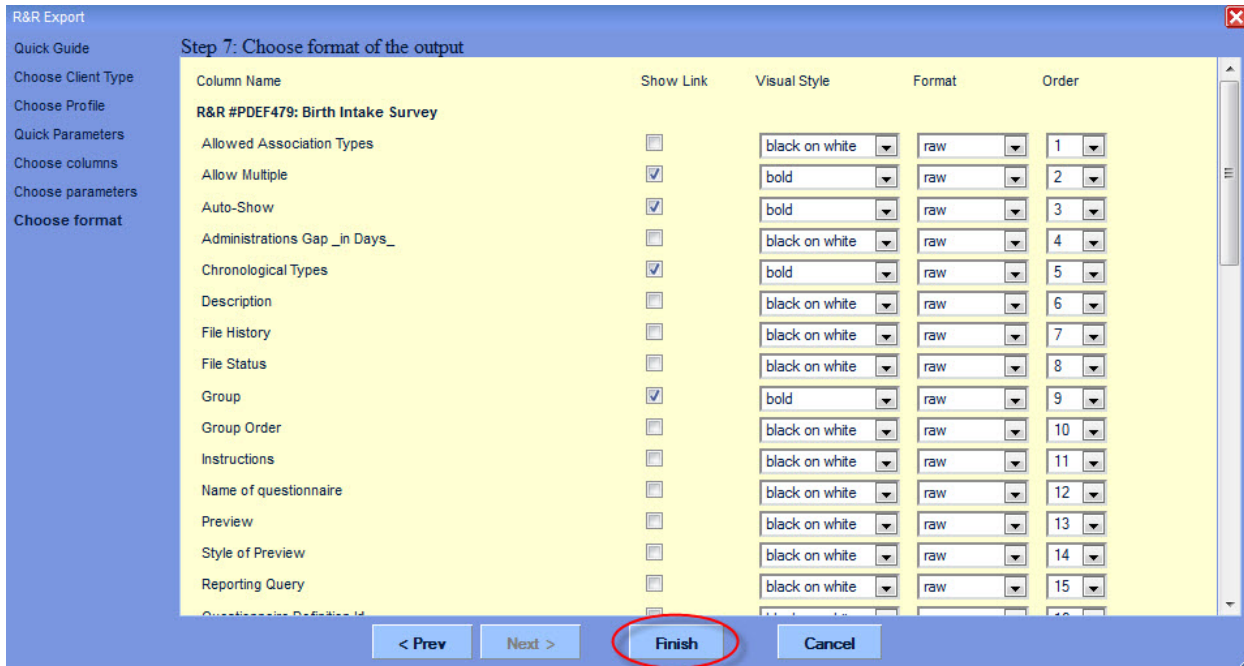


Figure 59: Choose Columns For Export and Click Next

The next screen will ask you to choose the parameters that you want to fill. Similar to the previous step, select your parameters by clicking on the check boxes located next to each parameter. You can also click “Select All” or “Select None” to choose all parameters for export or choose none of the parameters for export, respectively. Click on “Next” to continue.

The following step is to choose a format for the output. Specify the *Visual Style*, *Format*, and *Order* for your data and then click “Finish” to continue.



R&R Export
 Quick Guide
 Choose Client Type
 Choose Profile
 Quick Parameters
 Choose columns
 Choose parameters
 Choose format

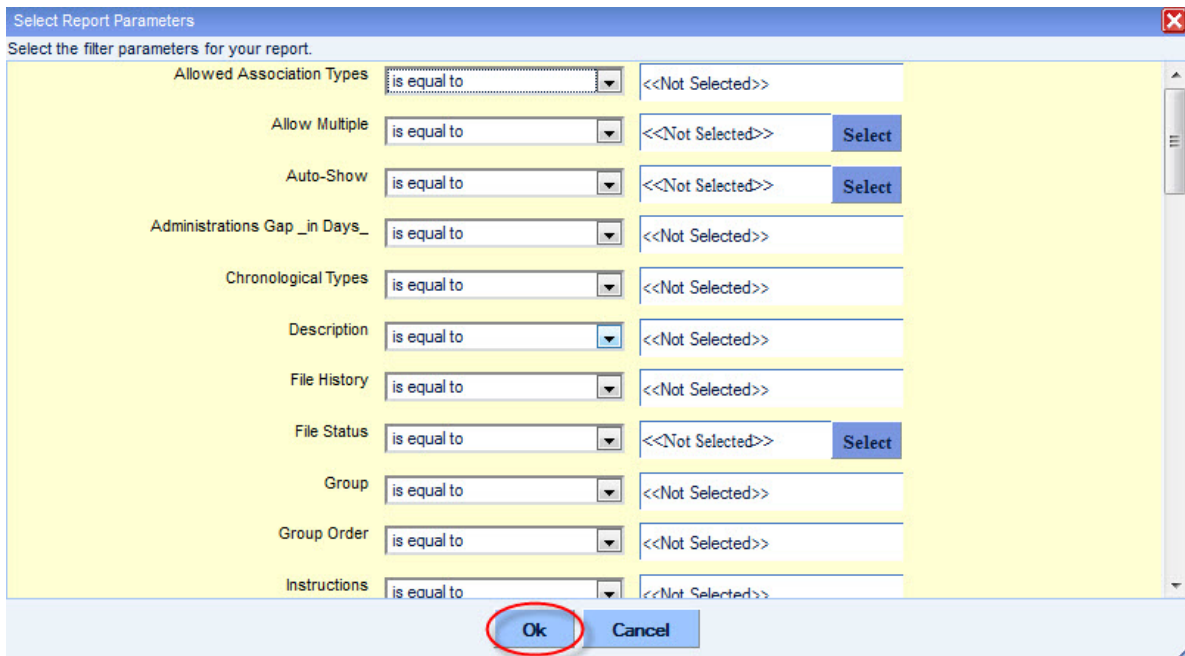
Step 7: Choose format of the output

Column Name	Show Link	Visual Style	Format	Order
R&R #PDEF479: Birth Intake Survey				
Allowed Association Types	☐	black on white	raw	1
Allow Multiple	☒	bold	raw	2
Auto-Show	☒	bold	raw	3
Administrations Gap_in Days_	☐	black on white	raw	4
Chronological Types	☒	bold	raw	5
Description	☐	black on white	raw	6
File History	☐	black on white	raw	7
File Status	☐	black on white	raw	8
Group	☒	bold	raw	9
Group Order	☐	black on white	raw	10
Instructions	☐	black on white	raw	11
Name of questionnaire	☐	black on white	raw	12
Preview	☐	black on white	raw	13
Style of Preview	☐	black on white	raw	14
Reporting Query	☐	black on white	raw	15

< Prev Next > **Finish** Cancel

Figure 60: Choose the Format of the Export and Click Finish to Continue

Before you can export and view your report, you must select the filter parameters for your report. When you have selected the desired filter parameters, click “OK” to proceed to the export window.



Select Report Parameters
 Select the filter parameters for your report.

Allowed Association Types	is equal to	<<Not Selected>>	
Allow Multiple	is equal to	<<Not Selected>>	Select
Auto-Show	is equal to	<<Not Selected>>	Select
Administrations Gap_in Days_	is equal to	<<Not Selected>>	
Chronological Types	is equal to	<<Not Selected>>	
Description	is equal to	<<Not Selected>>	
File History	is equal to	<<Not Selected>>	
File Status	is equal to	<<Not Selected>>	Select
Group	is equal to	<<Not Selected>>	
Group Order	is equal to	<<Not Selected>>	
Instructions	is equal to	<<Not Selected>>	

Ok Cancel

Figure 61: Choose Filter Parameters and Click Ok

You are now ready to export and view your report.

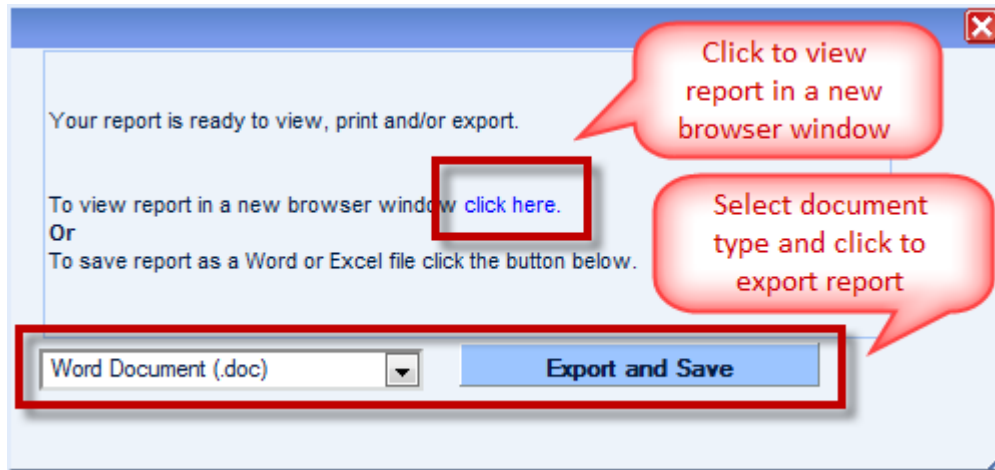


Figure 62: Export and View Your Report Using the Given Options

R&R ANALYSIS WIZARD MODULE

To access the R&R Analysis Wizard, simply click on the menu item as seen below.



Once you have selected *R&R Analysis Wizard* from the menu, you will be directed to a *Report Wizard* screen as shown below. Click “Next” to proceed.

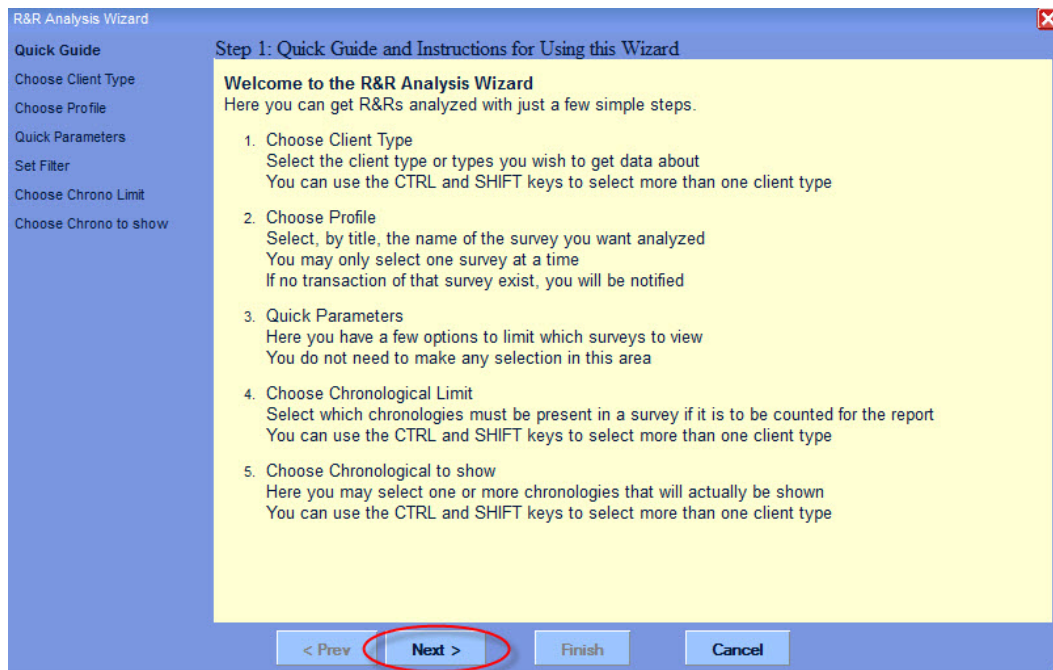


Figure 63: R&R Analysis Wizard Start Screen

Now you will be prompted to choose a *Client Type*. Select the desired *Client Type* and click “Next” to proceed.

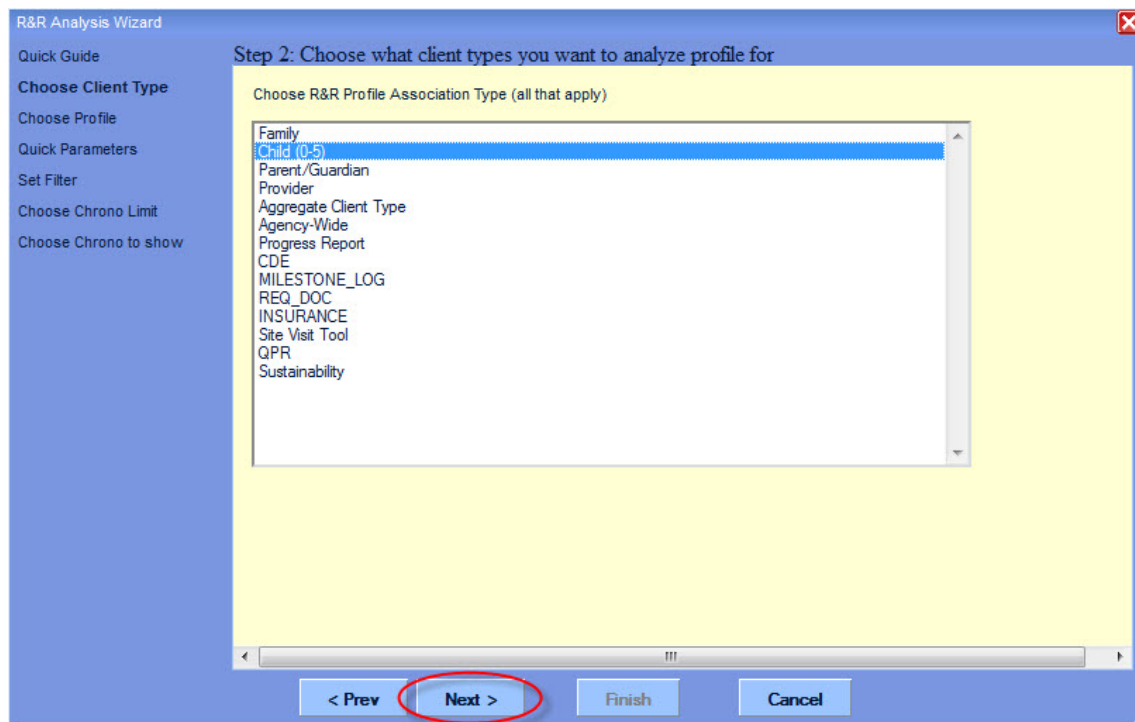


Figure 64: Choose Client Types and Click Next to Proceed

Next, choose a *Profile Type* and click “Next” to continue.

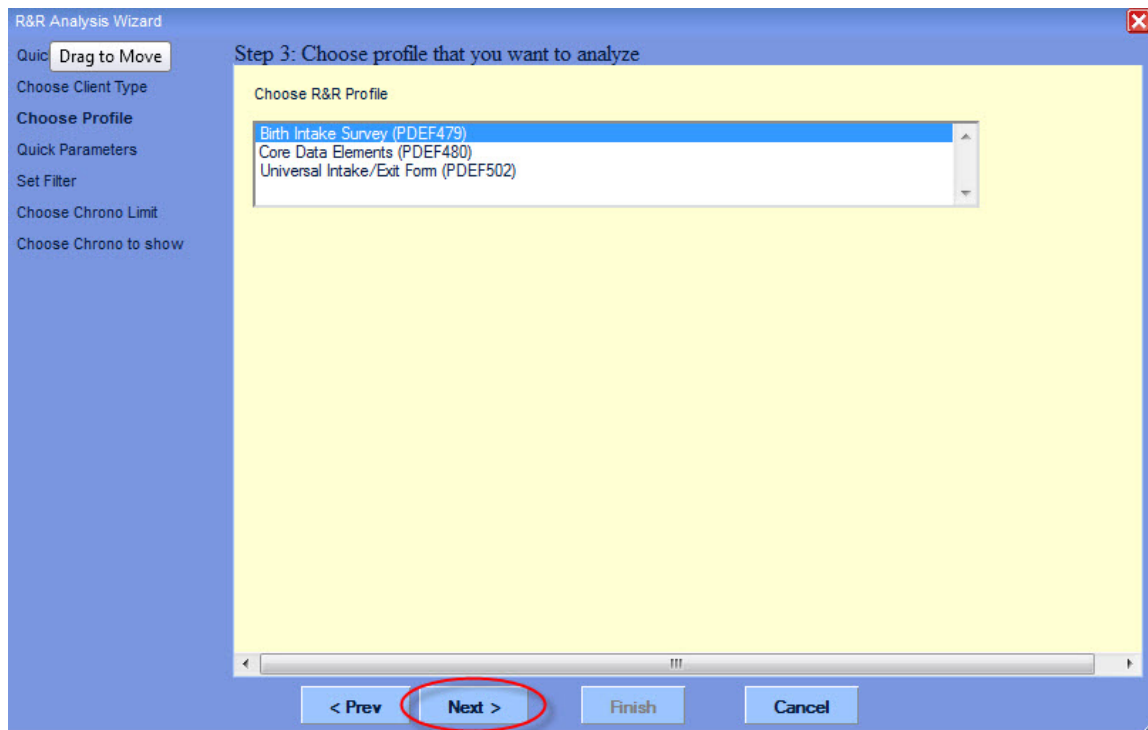


Figure 65: Choose Profile Types and Click Next to Proceed

The next screen will ask you to set a *Profile Filter* for your *R&R Analysis*. Once your *Profile Filter* is set, click “Next” to continue.

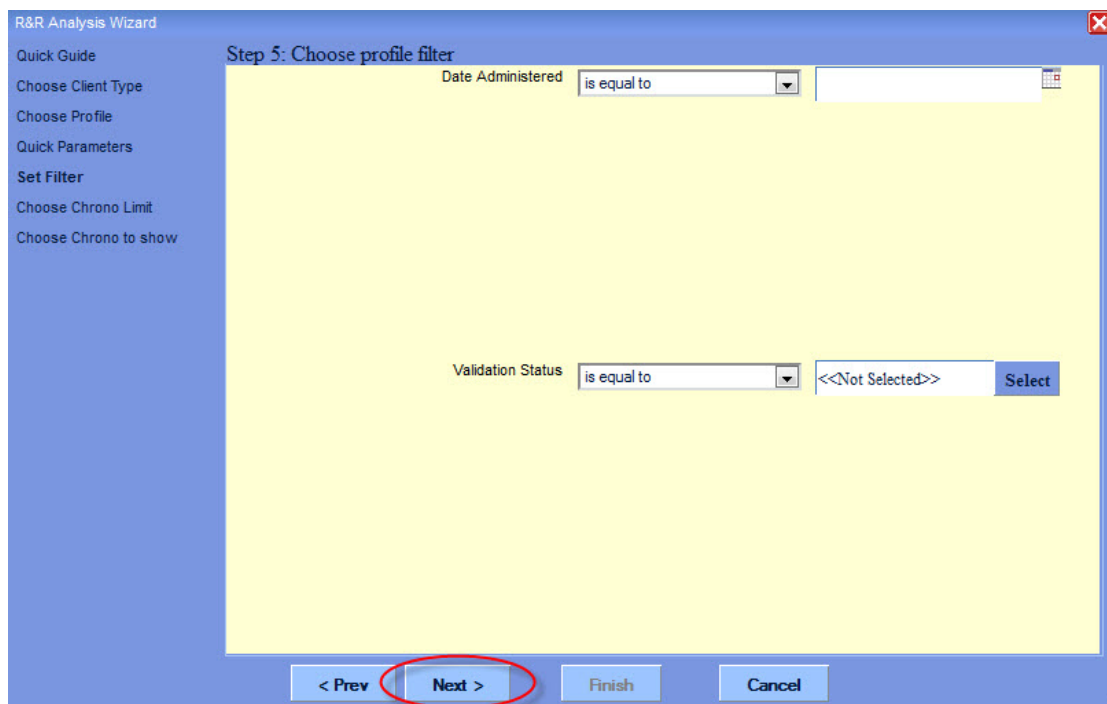


Figure 66: Choose Profile Filter and Click Next to Continue

Your report is now ready to view. Choose your preferred viewing and export method from the drop-down menu and click “Export and Save.”

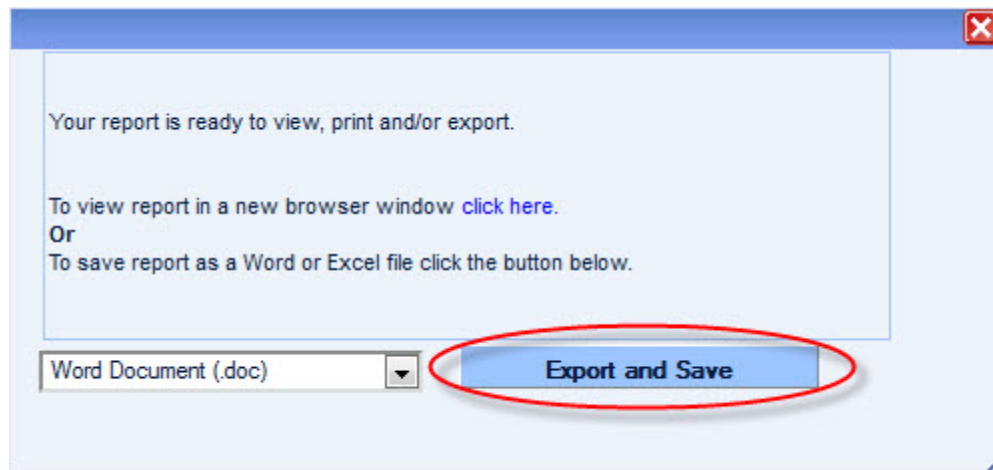


Figure 67: Select Viewing and Export Method and Click Export and Save Button

Here is sample of what your *R&R Analysis* should look like.

R&R Analysis Report for PDEF479				
Question	Group	Values	*Not Set*	*Not Set* Percent
Global Statistics				
		<i>Profile transactions</i>	2	
		<i>Distinct clients</i>	2	
1. When did this child's mother first receive prenatal care from a doctor?				
		(not selected)	0	0%
		a. 1st Trimester (0-3 months)	0	0%
		b. 2nd Trimester (4-6 months)	0	0%
		c. 3rd Trimester (7-9 months)	1	50%
		d. Not at all	0	0%
		e. Do not know	0	0%
		f. Decline to answer	0	0%
		Illegal value	0	0%
		Missing	1	50%
		Total	2	100%
2. How often did this child's mother receive prenatal care from a doctor throughout her pregnancy?				
		(not selected)	0	0%
		Once	0	0%
		2-6 Times	0	0%
		Monthly	1	50%
		Illegal value	0	0%
		Missing	1	50%
		Total	2	100%
3. Did this child's mother smoke during pregnancy?				
		(not selected)	0	0%
		Yes	0	0%
		No	1	50%
		Illegal value	0	0%
		Missing	1	50%
		Total	2	100%
4. What was the length of the pregnancy for this child?				
		(not selected)	0	0%
		Full term	1	50%
		Premature	0	0%
		Illegal value	0	0%
		Missing	0	0%
		Total	1	100%

Figure 68: Sample R&R Analysis Report

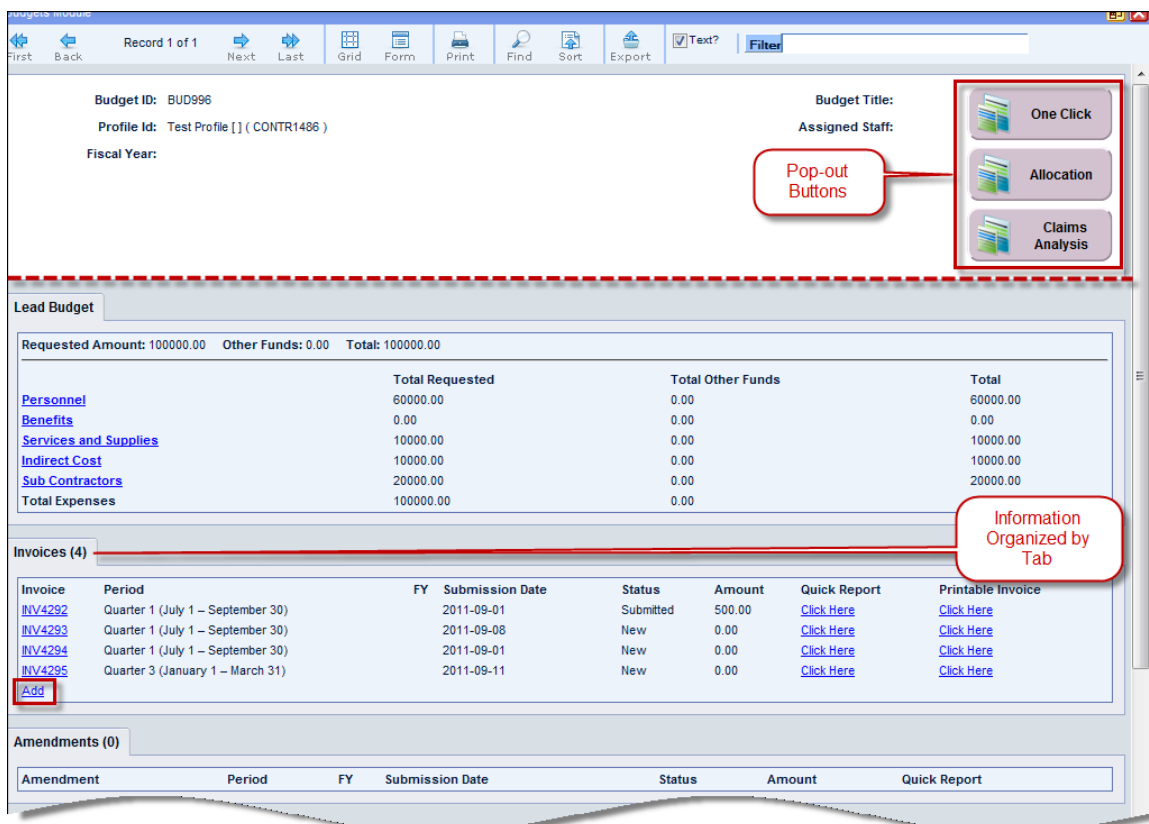
BUDGETS AND INVOICES

BUDGET/INVOICE MODULE OVERVIEW

The *Budget and Invoices* module allows you to view budgets allotted for your program. You can also generate invoices through this module. To access the *Budget and Invoices* module, simply click on the menu item as seen below.



Once *Budget and Invoices* has been selected from the menu, you will automatically be directed to the screen below. This module consists of a number of different tabs and fields of information. The Commission staff will input the specific budget amounts, so these figures will be visible to the user when viewing the module. The *Budget and Invoices* module is divided into two separate panes, the *Header Pane* and the *Details Pane*. The *Header Pane*, or top section of the *Budgets and Invoices* module, displays general information about the budget, such as *Budget ID*, *Contract ID* and *Fiscal Year*. You can navigate from one budget to the next by clicking the “Next” and “Back” buttons. The *Details Pane*, or bottom pane, includes specific data on each budget.



Budget ID: BUD996
Profile Id: Test Profile [] (CONTR1486)
Fiscal Year:

Budget Title:
Assigned Staff:

Pop-out Buttons: One Click, Allocation, Claims Analysis

Lead Budget

Requested Amount: 100000.00 Other Funds: 0.00 Total: 100000.00

	Total Requested	Total Other Funds	Total
Personnel	80000.00	0.00	80000.00
Benefits	0.00	0.00	0.00
Services and Supplies	10000.00	0.00	10000.00
Indirect Cost	10000.00	0.00	10000.00
Sub Contractors	20000.00	0.00	20000.00
Total Expenses	100000.00	0.00	

Invoices (4)

Invoice	Period	FY	Submission Date	Status	Amount	Quick Report	Printable Invoice
INV4292	Quarter 1 (July 1 – September 30)		2011-09-01	Submitted	500.00	Click Here	Click Here
INV4293	Quarter 1 (July 1 – September 30)		2011-09-08	New	0.00	Click Here	Click Here
INV4294	Quarter 1 (July 1 – September 30)		2011-09-01	New	0.00	Click Here	Click Here
INV4295	Quarter 3 (January 1 – March 31)		2011-09-11	New	0.00	Click Here	Click Here
Add							

Amendments (0)

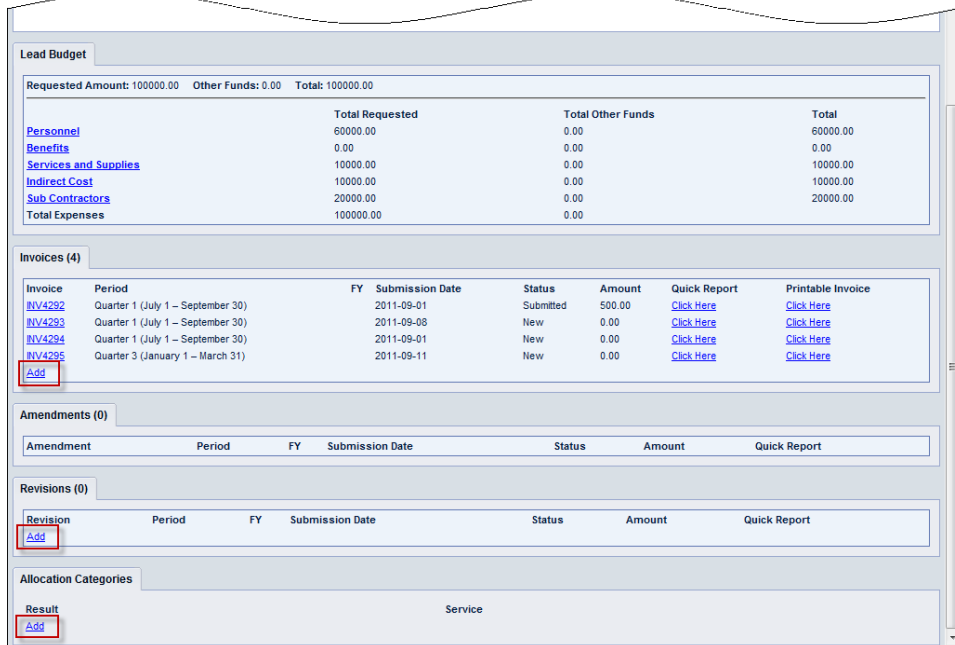
Amendment	Period	FY	Submission Date	Status	Amount	Quick Report
-----------	--------	----	-----------------	--------	--------	--------------

Information Organized by Tab

Figure 69: Budget and Invoices Module Overview

INVOICING

To create a new invoice, click on the *Invoices* tab, then click “Add.”



Lead Budget

Requested Amount: 100000.00 Other Funds: 0.00 Total: 100000.00

	Total Requested	Total Other Funds	Total
Personnel	60000.00	0.00	60000.00
Benefits	0.00	0.00	0.00
Services and Supplies	10000.00	0.00	10000.00
Indirect Cost	10000.00	0.00	10000.00
Sub Contractors	20000.00	0.00	20000.00
Total Expenses	100000.00	0.00	

Invoices (4)

Invoice	Period	FY	Submission Date	Status	Amount	Quick Report	Printable Invoice
INV4292	Quarter 1 (July 1 – September 30)		2011-09-01	Submitted	500.00	Click Here	Click Here
INV4293	Quarter 1 (July 1 – September 30)		2011-09-08	New	0.00	Click Here	Click Here
INV4294	Quarter 1 (July 1 – September 30)		2011-09-01	New	0.00	Click Here	Click Here
INV4295	Quarter 3 (January 1 – March 31)		2011-09-11	New	0.00	Click Here	Click Here
Add							

Amendments (0)

Amendment	Period	FY	Submission Date	Status	Amount	Quick Report
Add						

Revisions (0)

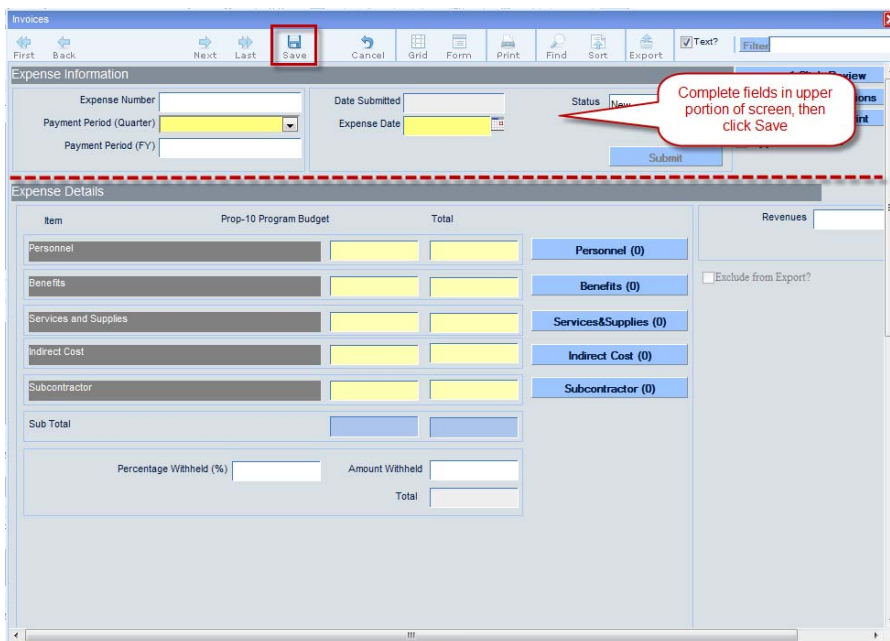
Revision	Period	FY	Submission Date	Status	Amount	Quick Report
Add						

Allocation Categories

Result	Service
Add	

Figure 70: Add Button Locations

After you click “Add,” you will be directed to the screen below. You must complete the top portion of the screen and save, as seen below. Until you save the top portion of the new invoice, you will be unable to enter any further information.



Invoices

First Back Next Last **Save** Cancel Grid Form Print Find Sort Export Text? Filter

Expense Information

Expense Number: Date Submitted: Status:

Payment Period (Quarter): Expense Date:

Payment Period (FY):

Expense Details

Item	Prop-10 Program Budget	Total
Personnel		
Benefits		
Services and Supplies		
Indirect Cost		
Subcontractor		
Sub Total		

Percentage Withheld (%): Amount Withheld:

Total:

Revenues:

Personnel (0)

Benefits (0)

Services&Supplies (0)

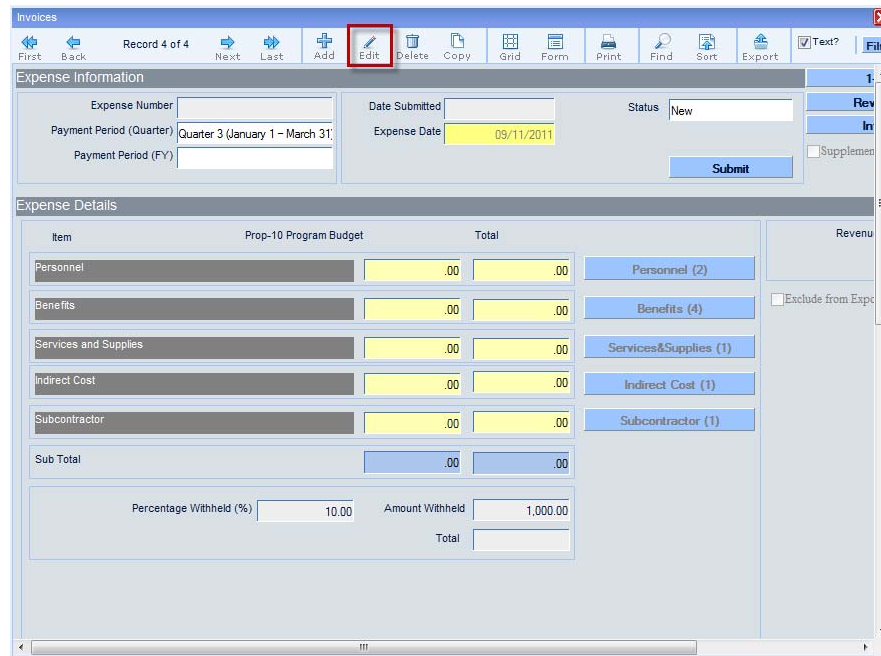
Indirect Cost (0)

Subcontractor (0)

☐ Exclude from Export?

Figure 71: Complete Information Fields in Upper Portion of Screen, Then Click Save

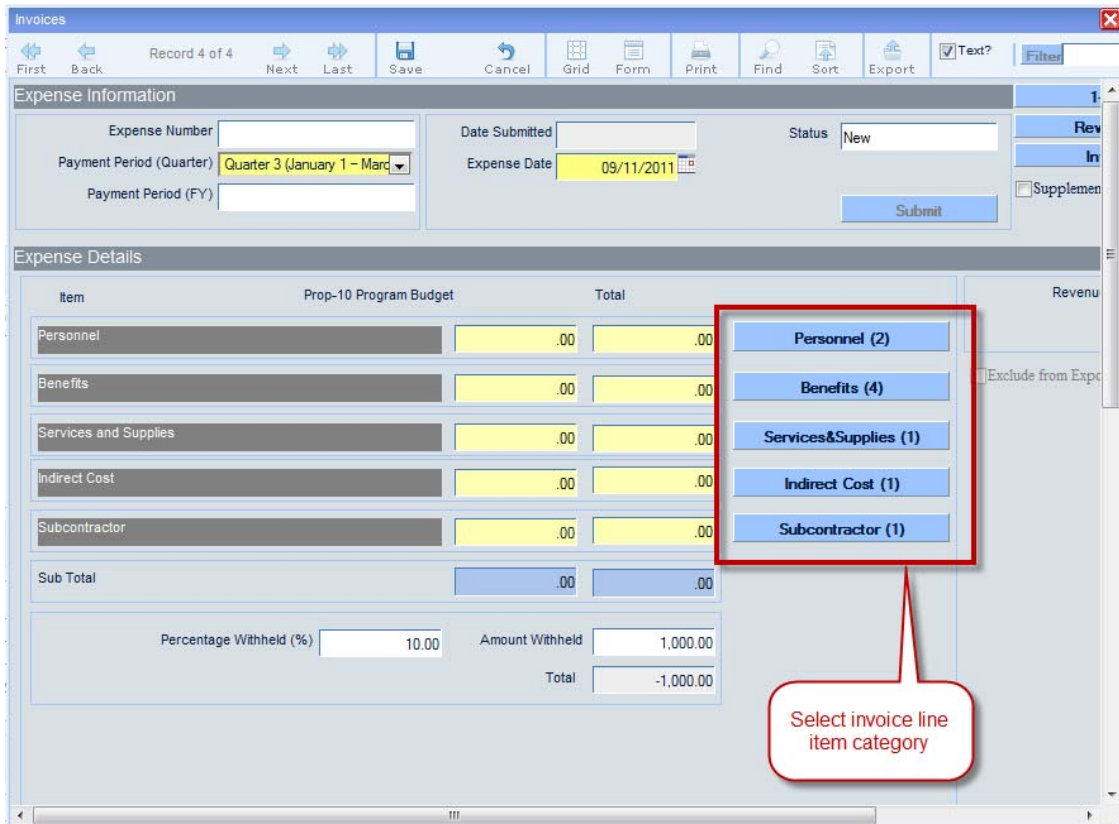
After you have saved the general invoice information, click “Edit” to enter specific information in the screen below. If you do not click “Edit,” you will not be able to complete the invoice.



The screenshot shows the 'Invoices' application window. The toolbar at the top includes buttons for First, Back, Record 4 of 4, Next, Last, Add, **Edit** (highlighted with a red box), Delete, Copy, Grid, Form, Print, Find, Sort, Export, and a Filter icon. The 'Expense Information' section contains fields for Expense Number, Date Submitted, Status (New), Payment Period (Quarter) (Quarter 3 (January 1 – March 31)), Expense Date (09/11/2011), and Payment Period (FY). A 'Submit' button is located at the bottom right of this section. The 'Expense Details' section features a table with columns for Item, Prop-10 Program Budget, and Total. The items listed are Personnel, Benefits, Services and Supplies, Indirect Cost, and Subcontractor, each with a corresponding blue button on the right (Personnel (2), Benefits (4), Services&Supplies (1), Indirect Cost (1), Subcontractor (1)). A 'Sub Total' row shows .00 for both budget and total. Below the table, there are fields for Percentage Withheld (%) (10.00), Amount Withheld (1,000.00), and a Total field.

Figure 72: Click on Edit to Complete the Invoice

After clicking “Edit,” you will be able to select the category of invoice you would like to create. The invoice categories are listed along the right side of the screen in blue. To select the invoice category, simply click on the appropriate blue button. If this is a *Supplemental Invoice*, check the box as seen below.



Invoices

Record 4 of 4

First Back Next Last Save Cancel Grid Form Print Find Sort Export

☒ Text? Filter

Expense Information

Expense Number: Date Submitted: Status: New

Payment Period (Quarter): **Quarter 3 (January 1 – Mar)** Expense Date: **09/11/2011**

Payment Period (FY): **Submit**

Expense Details

Item	Prop-10 Program Budget	Total	Revenue
Personnel	.00	.00	
Benefits	.00	.00	
Services and Supplies	.00	.00	
Indirect Cost	.00	.00	
Subcontractor	.00	.00	
Sub Total	.00	.00	

Percentage Withheld (%): 10.00 Amount Withheld: 1,000.00

Total: -1,000.00

Personnel (2)

Benefits (4)

Services&Supplies (1)

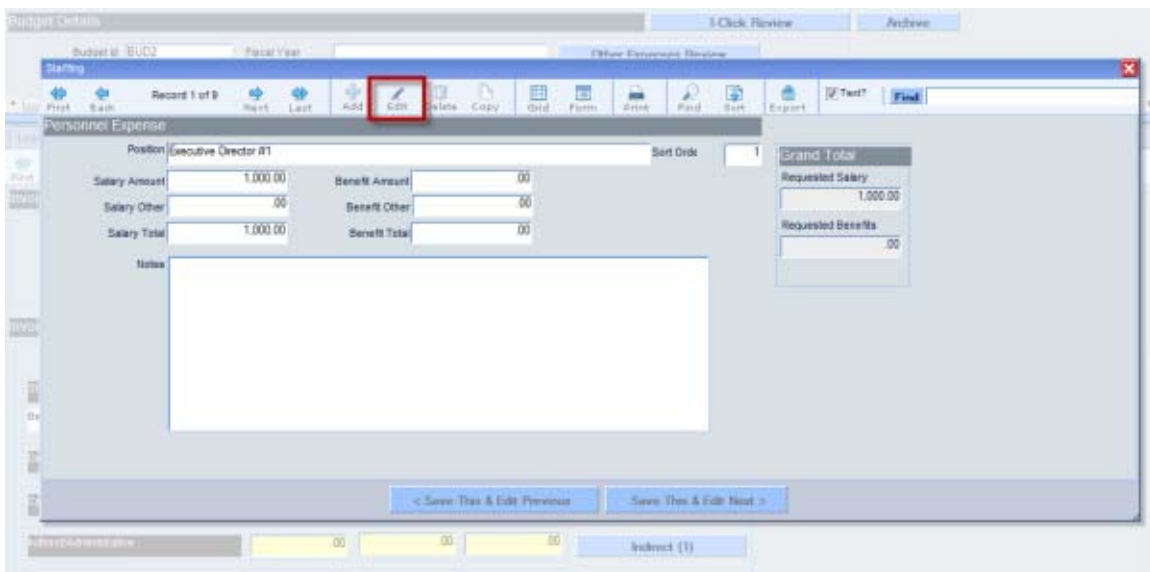
Indirect Cost (1)

Subcontractor (1)

Select invoice line item category

Figure 73: Select Invoice Line Item Category by Clicking on Corresponding Blue Buttons

After you click on “Invoice Category”, the pop-up box below will appear. To enter information into your invoice, click “Edit.”



Budget Details

Budget ID: BUD2 Fiscal Year: Filter: Economic Response

Staffing

Record 1 of 1

First Back Next Last Add Edit Delete Copy Grid Form Print Find Sort Export

☒ Text? Filter

Personnel Expense

Position: Executive Director #1 Sort Order: 1

Salary Amount: 1,000.00 Benefit Amount: .00

Salary Other: .00 Benefit Other: .00

Salary Total: 1,000.00 Benefit Total: .00

Notes:

Grand Total

Requested Salary: 1,000.00

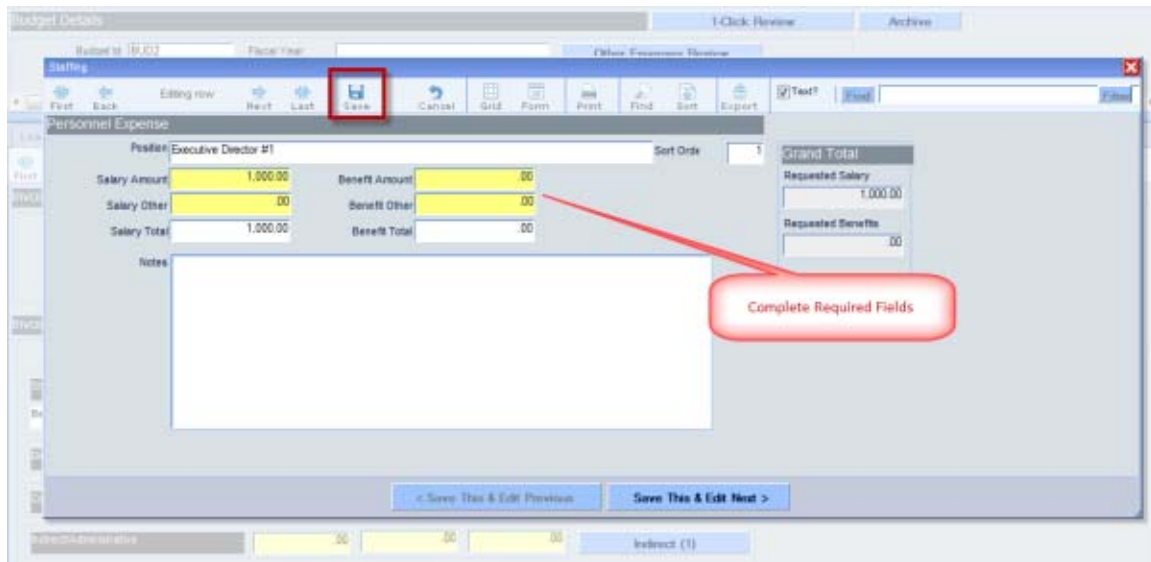
Requested Benefits: .00

< Save This & Edit Previous Save This & Edit Next >

Indirect (1)

Figure 74: Click Edit to Enter Information to Your Invoice

After you click “Edit,” the pop-up box will be in edit mode, allowing you to input the necessary numbers. Required fields are colored yellow. However, if an amount of 0 applies to one of the required fields, you will still be able to save the record with the existing number 0 in the box. You do not need to input any additional numbers since 0 fulfills the requirement of completing the required field. After you have completed your entry, click “Save.”



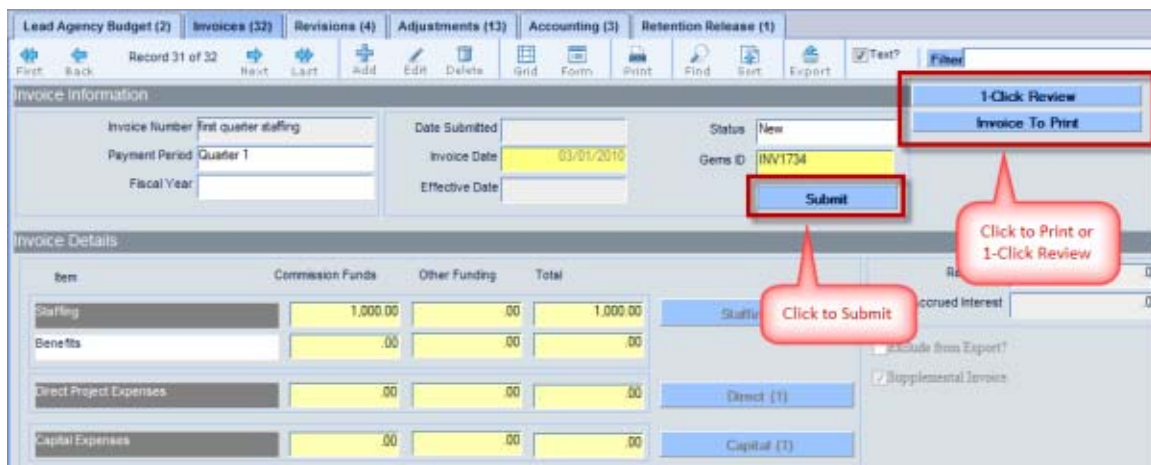
The screenshot shows the 'Personnel Expense' form. The 'Save' button is highlighted with a red box. A red callout bubble points to the 'Benefit Amount' field with the text 'Complete Required Fields'.

Field	Value
Salary Amount	1,000.00
Benefit Amount	.00
Salary Other	.00
Benefit Other	.00
Salary Total	1,000.00
Benefit Total	.00

Grand Total:
Requested Salary: 1,000.00
Requested Benefits: .00

Figure 75: Click Save After Required Information Has Been Entered

After you have saved your invoice, you will be directed to the screen below. Your invoice is now complete and can be reviewed, printed or submitted. If you need to make changes to your invoice, click “Edit.” You can make changes to your invoice until you submit it, at which time it can no longer be edited.



The screenshot shows the 'Invoice Information' and 'Invoice Details' sections. The '1-Click Review Invoice To Print' button is highlighted with a red box. A red callout bubble points to the 'Submit' button with the text 'Click to Submit'. Another red callout bubble points to the '1-Click Review Invoice To Print' button with the text 'Click to Print or 1-Click Review'.

Item	Commission Funds	Other Funding	Total
Staffing	1,000.00	.00	1,000.00
Benefits	.00	.00	.00
Direct Project Expenses	.00	.00	.00
Capital Expenses	.00	.00	.00

Figure 76: Make Necessary Changes to Invoice, Then Submit, Review, or Print

BUDGET REVISIONS

This area allows you to revise an *Agency Budget*. In this screen you can add or remove funds to or from a budget line item. To add a new revision, click “Add” shown below and complete the related fields.


 The screenshot shows the 'Budget Revisions' interface. At the top, there's a section for 'Amendments (0)' with a table header: Amendment, Period, FY, Submission Date, Status, Amount, Quick Report. Below this is a section for 'Revisions (0)' with a table header: Revision, Period, FY, Submission Date, Status, Amount, Quick Report. The 'Add' button in the 'Revisions' section is circled in red. At the bottom, there's an 'Allocation Categories' section with a table header: Result, Service.

Figure 77: Add New Budget Revision

You will be directed to the screen below. First, you will need to enter information into the *Header Pane*. This information includes *Revision Date*, *Payment Period (Month)*, *Payment Period (FY)*. Then click “Save” to proceed.

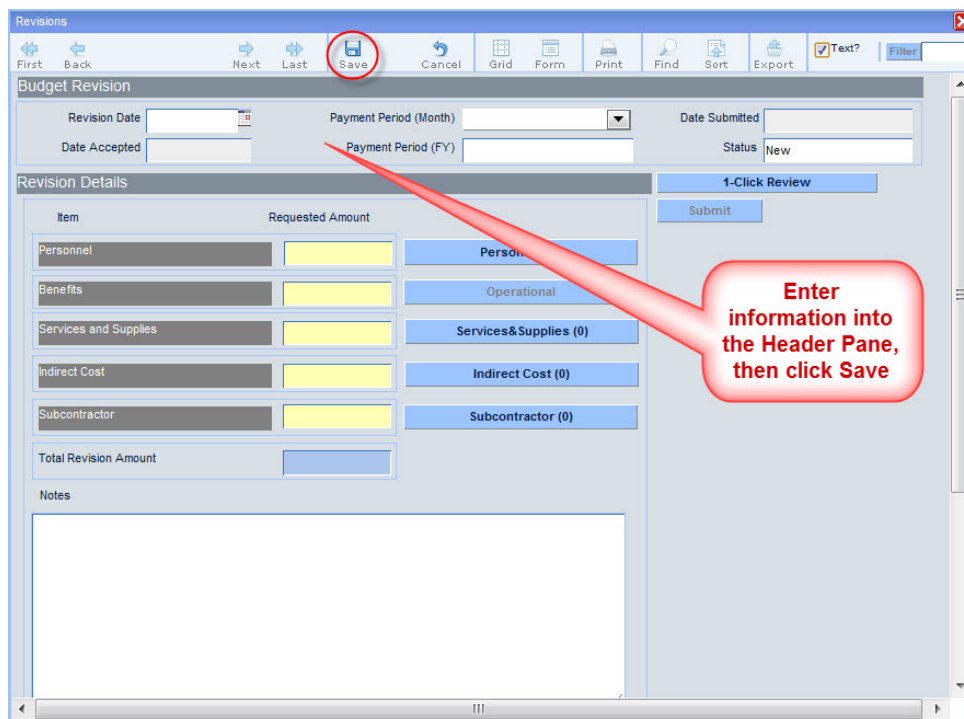
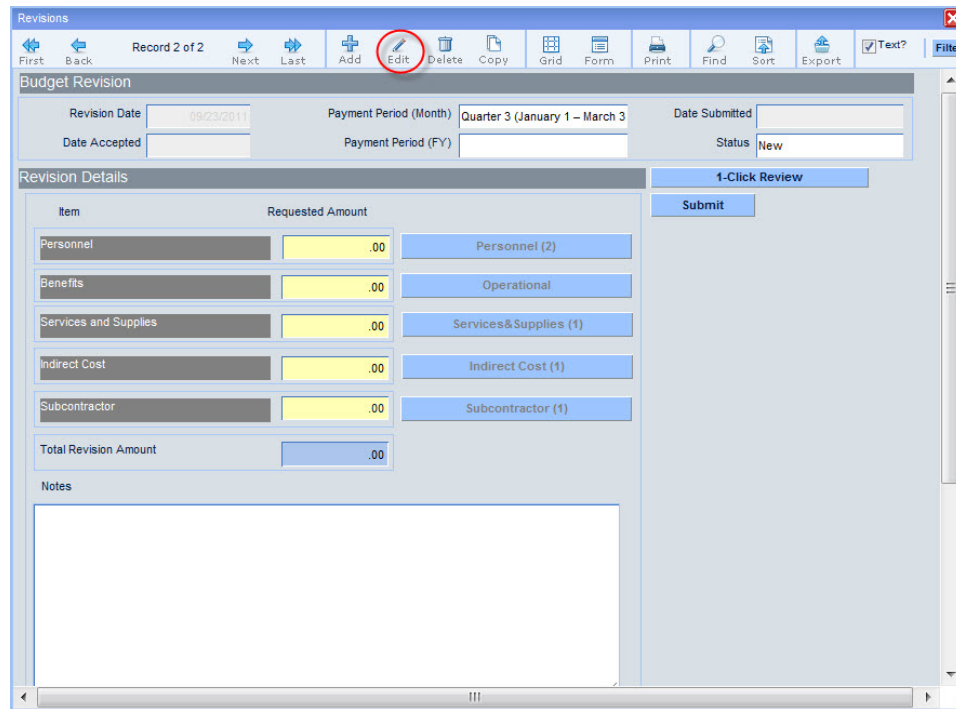

 The screenshot shows the 'Budget Revision' form. The 'Header Pane' contains fields for 'Revision Date', 'Payment Period (Month)', 'Date Submitted', 'Date Accepted', 'Payment Period (FY)', and 'Status'. The 'Save' button in the top toolbar is circled in red. A red callout box points to the 'Save' button with the text: 'Enter information into the Header Pane, then click Save'. Below the header pane is the 'Revision Details' section with a table for 'Item' and 'Requested Amount'. The items listed are Personnel, Benefits, Services and Supplies, Indirect Cost, and Subcontractor. To the right of the table are buttons for 'Personnel', 'Operational', 'Services&Supplies (0)', 'Indirect Cost (0)', and 'Subcontractor (0)'. At the bottom right, there are buttons for '1-Click Review' and 'Submit'. A 'Notes' section is at the bottom left.

Figure 78: Enter Budget Revision Information Then Click Save

Once the initial information is saved, you will be brought back to the Revisions window. To enter revisions, click “Edit” as shown below.



Item	Requested Amount
Personnel	.00
Benefits	.00
Services and Supplies	.00
Indirect Cost	.00
Subcontractor	.00
Total Revision Amount	.00

Figure 79: Click Edit to Enter Revisions

You can now enter *Revision Details* in the *Details Pane*. To make a revision, simply click on the blue box that corresponds with the budget area you are revising. You can make revisions to Personnel, Services & Supplies, Indirect Cost, and Subcontractor fields. When you click on the desired blue box, a new window will appear. The figure below shows a revision to a Personnel Expense. To make a revision, click “Edit”.

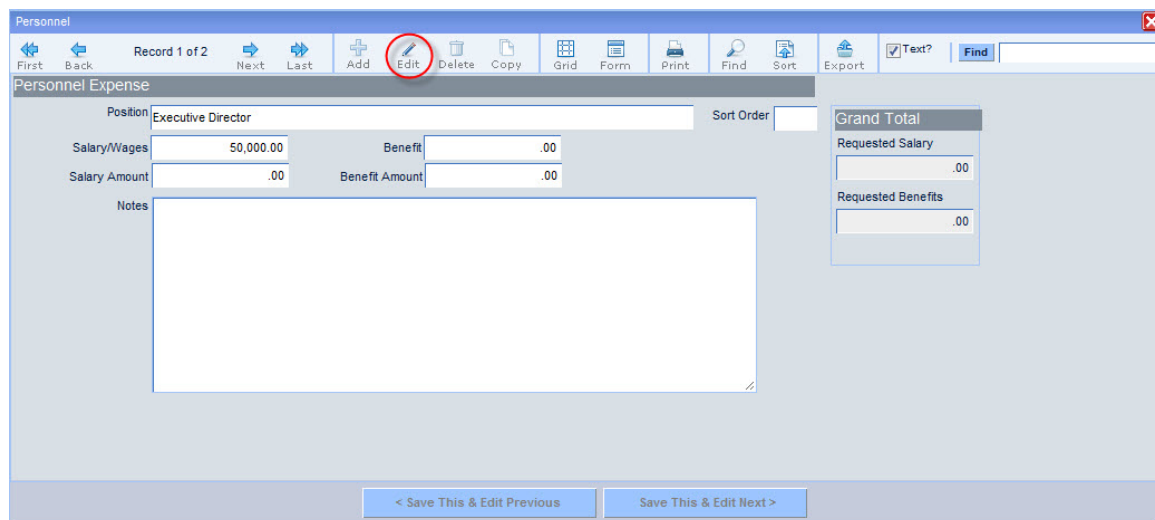
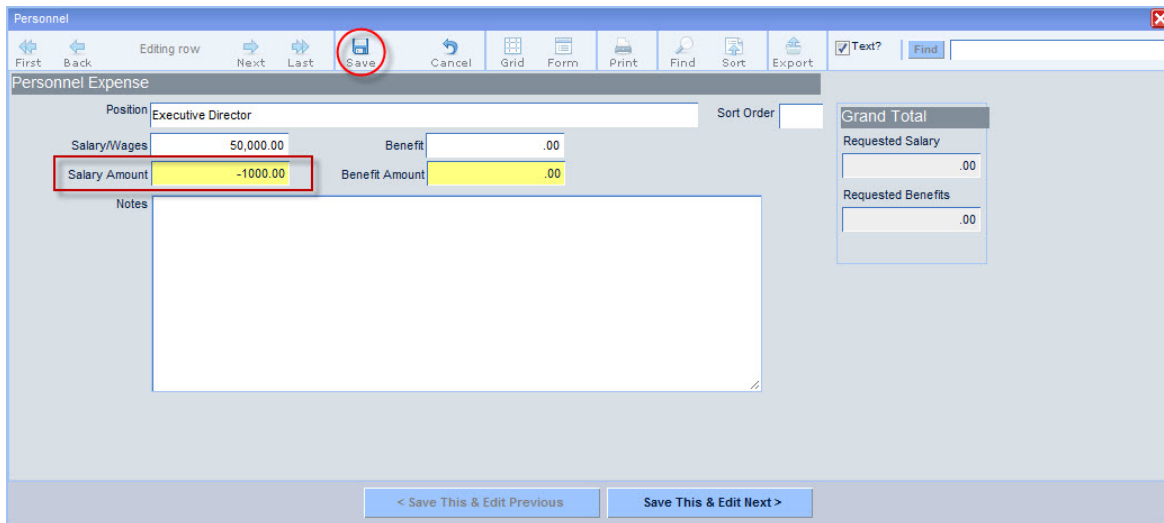


Figure 80: Personnel Expense Revision Window

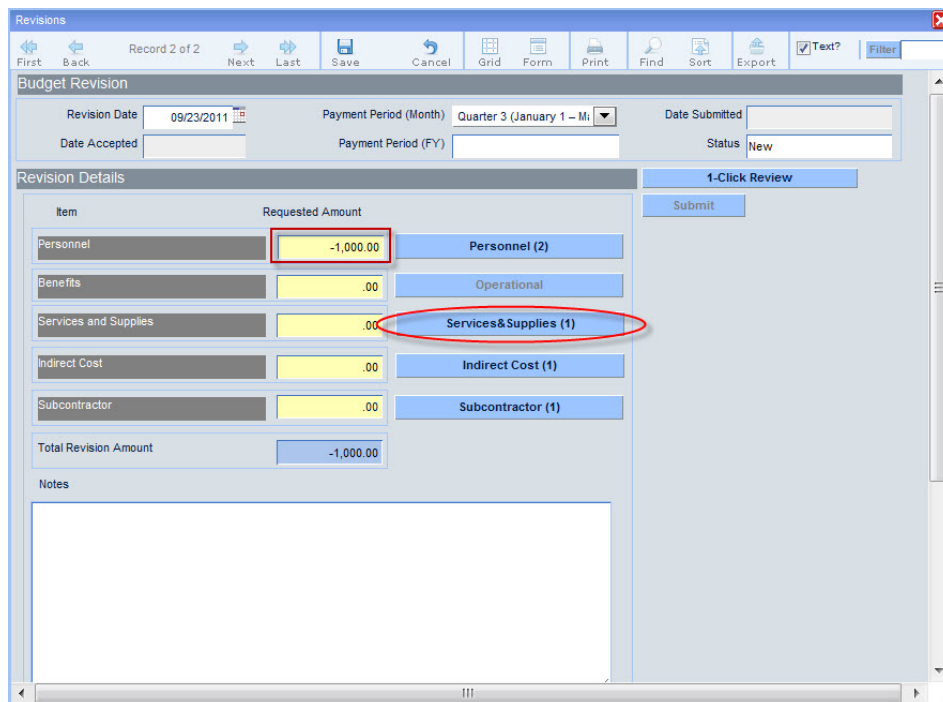
In this example, in order to move \$1,000 from the Executive Director's salary amount you simply input "-1,000.00" into the *Salary Amount* field shown in the figure below. Then, click "Save" to continue.



The screenshot shows the 'Personnel Expense' window. The 'Position' is 'Executive Director'. The 'Salary/Wages' field is 50,000.00. The 'Salary Amount' field is highlighted with a red box and contains '-1000.00'. The 'Benefit' field is .00. The 'Benefit Amount' field is .00. The 'Grand Total' section shows 'Requested Salary' as .00 and 'Requested Benefits' as .00. The 'Save' button in the top toolbar is circled in red. At the bottom, there are buttons for '< Save This & Edit Previous' and 'Save This & Edit Next >'. A 'Notes' text area is also present.

Figure 81: Personnel Expense Revision Window

You will now be directed back to the *Revisions* window, where the "-1,000.00" should be displayed next to the blue box labeled *Personnel*. Now, say you want this \$1,000 put towards services and supplies. First, click on the blue box labeled *Services & Supplies*.



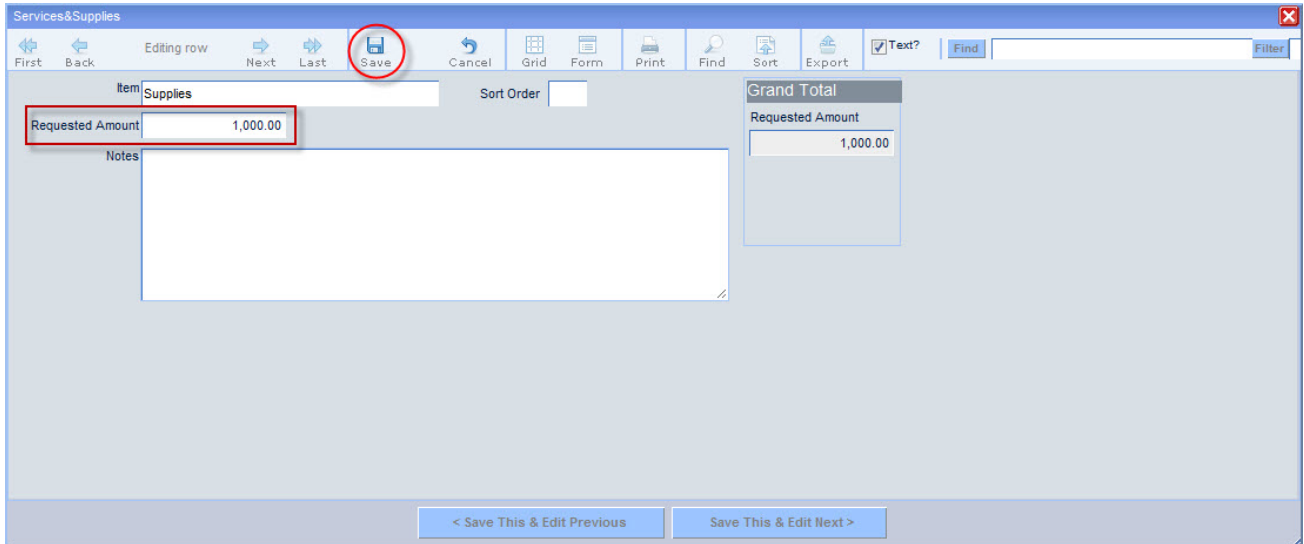
The screenshot shows the 'Budget Revision' window. The 'Revision Date' is 09/23/2011. The 'Payment Period (Month)' is Quarter 3 (January 1 - Mi). The 'Date Submitted' is empty. The 'Status' is New. The 'Revision Details' table shows the following items and requested amounts:

Item	Requested Amount	Category
Personnel	-1,000.00	Personnel (2)
Benefits	.00	Operational
Services and Supplies	.00	Services & Supplies (1)
Indirect Cost	.00	Indirect Cost (1)
Subcontractor	.00	Subcontractor (1)
Total Revision Amount	-1,000.00	

The 'Services & Supplies (1)' category is circled in red. The 'Total Revision Amount' is -1,000.00. There is a 'Notes' text area at the bottom. On the right side, there are buttons for '1-Click Review' and 'Submit'.

Figure 82: Budget Revision Window

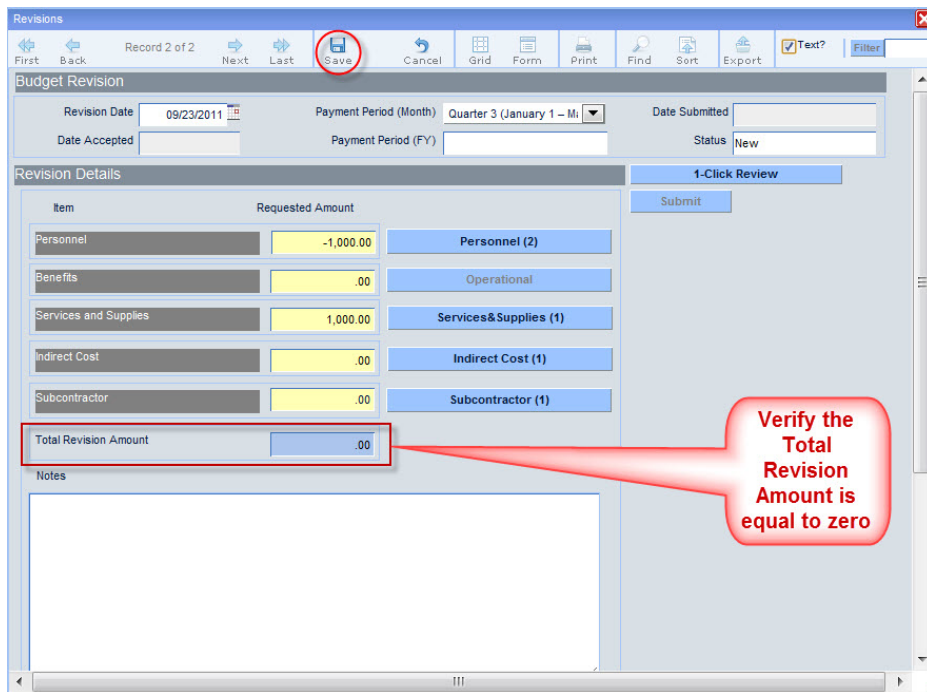
A new window will appear. Click “Edit” in the upper toolbar to make the necessary changes. You can now enter “1,000.00” into the informational field labeled *Requested Amount* as shown below. Click “Save” to continue.



The screenshot shows the 'Services & Supplies' window. The 'Item' field is set to 'Supplies'. The 'Requested Amount' field is highlighted with a red box and contains the value '1,000.00'. The 'Save' button in the toolbar is also highlighted with a red circle. A 'Grand Total' box on the right shows 'Requested Amount' as '1,000.00'. At the bottom, there are buttons for '< Save This & Edit Previous' and 'Save This & Edit Next >'. The toolbar includes buttons for First, Back, Editing row, Next, Last, Save, Cancel, Grid, Form, Print, Find, Sort, Export, and a Filter button.

Figure 83: Update Requested Amount Field and Click Save

You will now be directed back to the Revisions window. Make sure that the *Total Revision Amount* at the bottom is equal to zero. Then click “Save” to continue. You are now able to *Submit* the revision by clicking the blue “Submit” button on the right side of the window.



The screenshot shows the 'Revisions' window. The 'Budget Revision' section includes fields for Revision Date (09/23/2011), Payment Period (Month) (Quarter 3 (January 1 – M)), Date Submitted, Date Accepted, Payment Period (FY), and Status (New). The 'Revision Details' table lists items and their requested amounts:

Item	Requested Amount	
Personnel	-1,000.00	Personnel (2)
Benefits	.00	Operational
Services and Supplies	1,000.00	Services&Supplies (1)
Indirect Cost	.00	Indirect Cost (1)
Subcontractor	.00	Subcontractor (1)
Total Revision Amount	.00	

The 'Total Revision Amount' field is highlighted with a red box. A red callout bubble points to this field with the text: 'Verify the Total Revision Amount is equal to zero'. The 'Save' button in the toolbar is highlighted with a red circle. On the right side, there are buttons for '1-Click Review' and 'Submit'. The toolbar includes buttons for First, Back, Record 2 of 2, Next, Last, Save, Cancel, Grid, Form, Print, Find, Sort, Export, and a Filter button.

Figure 84: Verify Total Revision Amount and Click Save

ADMINISTRATION AND COMMUNICATION

CONTRACT INFORMATION

To access contract information details, simply click on the *Contract Information* link in the main GEMS menu. You will be directed to the screen below, where you can add, edit or view general contract details.

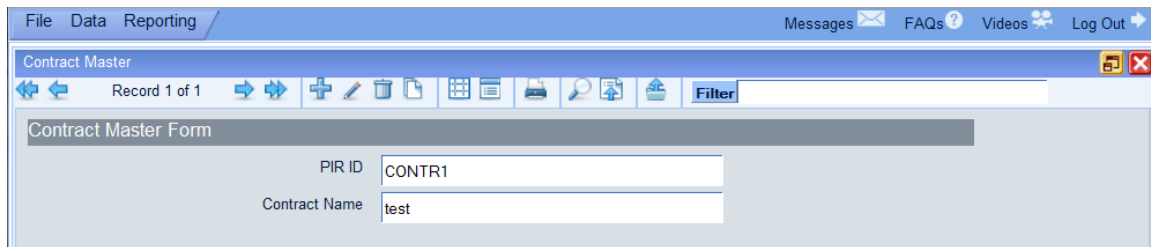


Figure 85: Contract Information

YOUR GEMS USER ACCOUNT

You can change your GEMS password through the *Administration and Communication* module. Click *Your GEMS User Account* to access the page below. After you click edit, the *Change* button will be activated, allowing you to change your password.

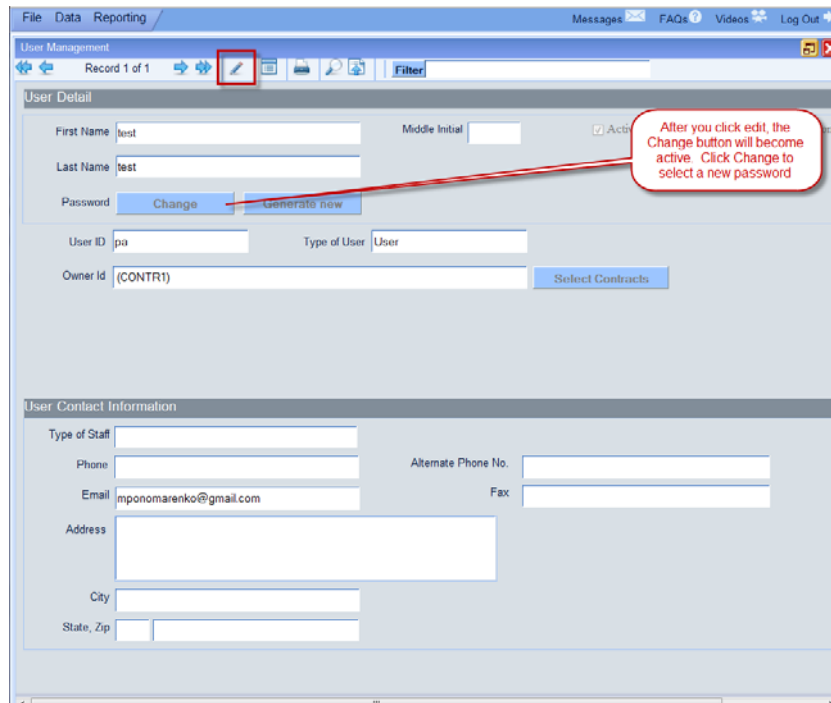
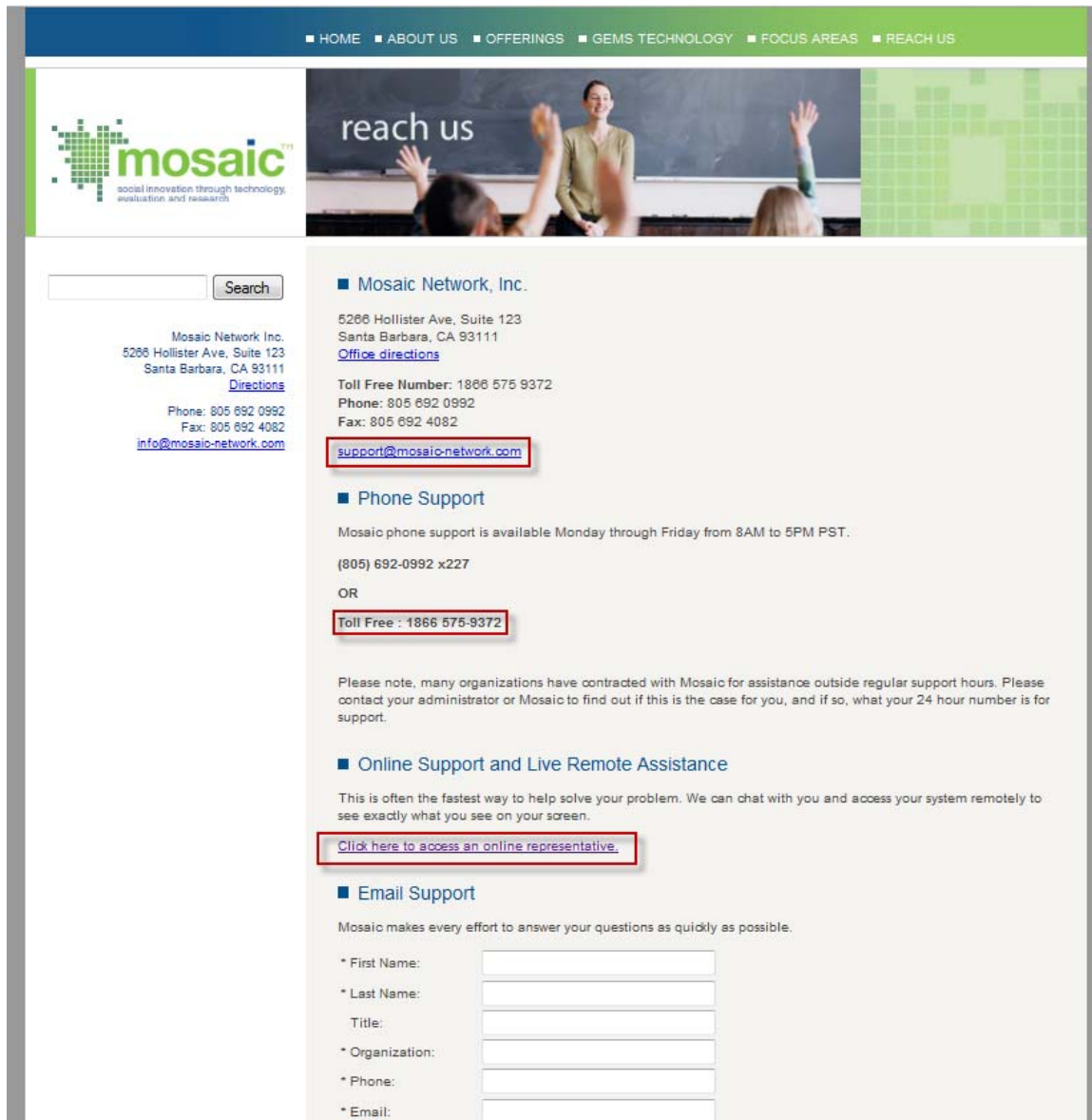


Figure 86: Updating Your Password

REQUEST GEMS SUPPORT

You can contact GEMS support with any questions or concerns you may have. Simply click the *Request GEMS Support* link on your desktop to access the page below.



■ HOME ■ ABOUT US ■ OFFERINGS ■ GEMS TECHNOLOGY ■ FOCUS AREAS ■ REACH US

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Santa Barbara, CA 93111
[Directions](#)
Phone: 805 692 0992
Fax: 805 692 4082
info@mosaic-network.com

■ Mosaic Network, Inc.
5266 Hollister Ave, Suite 123
Santa Barbara, CA 93111
[Office directions](#)
Toll Free Number: 1866 575 9372
Phone: 805 692 0992
Fax: 805 692 4082
support@mosaic-network.com

■ Phone Support
Mosaic phone support is available Monday through Friday from 8AM to 5PM PST.
(805) 692-0992 x227
OR
Toll Free : 1866 575-9372

Please note, many organizations have contracted with Mosaic for assistance outside regular support hours. Please contact your administrator or Mosaic to find out if this is the case for you, and if so, what your 24 hour number is for support.

■ Online Support and Live Remote Assistance
This is often the fastest way to help solve your problem. We can chat with you and access your system remotely to see exactly what you see on your screen.
[Click here to access an online representative.](#)

■ Email Support
Mosaic makes every effort to answer your questions as quickly as possible.

* First Name:
* Last Name:
Title:
* Organization:
* Phone:
* Email:

Figure 87: GEMS Support